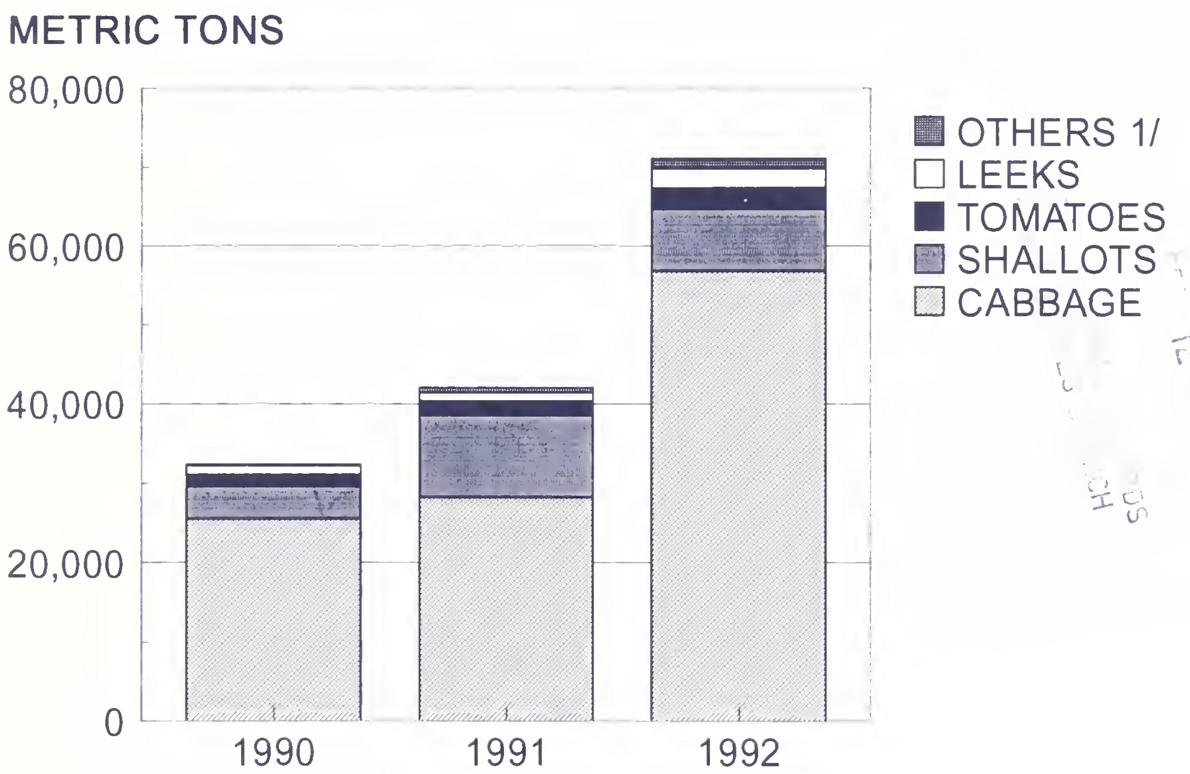
United States Department of Agriculture

Foreign Agricultural Service

Circular Series
FHORT 7-94
July 1994

World Horticultural Trade & U.S. Export Opportunities

INDONESIA'S VEGETABLE EXPORTS RISE AS HORTICULTURAL SECTOR EXPANDS



Source: Indonesia Central Bureau of Statistics
Note: data are for selected temperate climate vegetables.
1/ Others includes Peppers, Eggplants, and Asparagus.

Indonesia is a rapidly growing market for U.S. fruits and vegetables. At the same time, Indonesia's efforts to develop an export industry for horticultural products are increasing. Noted for a wide array of tropical fruits and vegetables, Indonesia is also producing an increasing variety of temperate climate horticultural crops for both local consumption and export markets. Exports have risen steadily over the past few years, reaching 70,000 tons in 1992. Indonesia's export volume for vegetables is only about four percent that of the United States. **[For further details on the outlook for competition from Indonesia's horticultural industry, see article page 9]**

Approved by the World Agricultural Outlook Board - USDA

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Export Summary

U.S. horticultural exports rose again in April 1994, to $653 million, 5 percent over April 1993. Major increases in tree nuts (up 25 percent to $80.9 million) and beer (up 87 percent to $37.8 million) more than made up for sharp declines in fresh vegetables (down 15 percent to $91.2 million), canned vegetables (down 16 percent to $41.4 million), and nursery products (down 14 percent to $24.9 million). Total exports for fiscal year 1994-to-date (October-April) were $4.5 billion, up 8 percent over FY 1993.

All measures not otherwise noted are metric. One kilogram (kg.) = 2.2046 pounds, 1 metric ton = 2,204.62 pounds, 1 liter = 0.2642 gallon, 1 hectoliter (hl.) = 26.42 gallons, and 1 hectare (ha.) = 2.471 acres.

U.S. EXPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
APR 94

NAME	QUANTITY					VALUE (1,000 DOLLARS)				
GROUP & COMMODITY	CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR, FRUIT CITRUS MT										
GRAPEFRUIT	67,404	65,202	350,949	378,165	444,767	32,752	32,763	175,012	188,597	222,290
LEMONS	11,555	7,427	84,192	76,579	127,336	7,200	4,490	53,989	58,798	99,698
ORANGES, INCL TMPLS	71,513	69,173	336,383	317,120	562,596	34,056	36,963	162,196	171,828	279,503
OTHER CITRUS	1,049	4,202	17,752	24,288	19,313	961	2,825	15,322	18,663	16,507
Subtotal:----	151,523	146,005	789,277	796,153	1,154,014	74,971	77,043	406,520	437,888	618,001
FR, FRT, NON-CIT MT										
APPLES	36,750	53,625	344,726	425,440	487,808	19,949	31,551	207,692	260,879	297,141
AVOCADOS	2,572	464	5,957	3,527	14,185	2,581	945	6,492	4,041	14,223
CHERRIES SWT & TRT	70	11	538	214	25,747	251	43	1,098	541	111,252
GRAPES	1,071	1,683	73,379	95,104	184,774	1,520	2,221	84,827	108,719	215,189
KIWIFRUIT	1,653	1,124	7,444	7,873	8,359	2,572	1,858	10,909	11,978	12,071
MELONS	5,141	7,372	32,702	34,320	196,473	3,167	3,875	18,814	20,471	74,192
PAPAYA	658	688	4,551	4,429	7,596	1,263	1,342	8,384	8,498	14,151
PEACHES & NCTRNS	283	215	3,858	3,125	63,998	350	256	3,849	3,087	57,507
PEARS	5,637	9,229	69,134	89,174	98,815	3,490	4,862	41,960	49,087	60,258
PLUMS/PRUNES	134	82	5,728	3,460	56,959	181	116	5,120	3,234	52,120
STRAWBERRIES	8,086	8,614	18,444	21,010	45,415	9,664	10,181	32,627	37,553	77,412
OTHER NON-CITRUS	2,170	1,984	19,258	22,706	53,452	2,058	2,461	17,372	21,181	53,860
Subtotal:----	64,231	85,095	585,723	710,390	1,243,586	47,052	59,715	439,151	529,274	1,039,381
CND/PREP FRUIT MT										
CHERRIES TRT CND	601	308	4,397	2,731	7,322	1,070	600	7,305	4,768	12,632
FRUIT MIXTURES	3,493	1,823	22,396	14,934	35,007	3,898	2,109	24,465	17,626	39,597
MARACHINO CHRY	309	276	2,722	2,769	4,912	673	522	5,406	5,337	9,706
PEACHES CANNED	1,801	1,764	12,258	10,476	21,390	1,645	1,627	12,067	10,123	20,960
PINEAPPLE CANNED	272	141	2,606	2,290	4,295	223	133	2,413	2,057	3,931
FRT PREP/PRES	4,463	5,201	37,918	35,329	61,466	5,555	5,768	46,422	40,393	75,437
OTHER CANNED FR	4,772	5,939	19,189	20,899	32,246	3,554	4,085	18,048	17,523	30,629
Subtotal:----	15,714	15,456	101,488	89,430	166,641	16,621	14,848	116,129	97,830	192,895
DRIED FRUIT MT										
PRUNES, DRIED	8,053	4,401	56,788	35,380	84,752	11,218	10,979	83,978	81,650	137,529
RAISINS, DRIED	7,609	9,063	66,772	69,879	121,529	11,578	14,334	94,413	109,691	180,885
OTHER DRIED FRUIT	1,608	1,907	12,390	13,229	19,865	4,442	4,071	31,361	32,427	49,237
Subtotal:----	17,270	15,372	135,952	118,488	226,148	27,239	29,385	209,754	223,768	367,651
FROZEN FRUIT MT										
BLUEBERRIES, FZN	781	447	5,776	3,214	8,600	1,394	669	10,329	5,031	15,058
STRAWBERRIES, FZN	536	1,282	5,629	10,942	16,017	717	1,666	7,265	14,601	20,864
OTHER FZN FRUIT	944	1,095	8,870	6,411	16,231	1,344	1,578	12,336	10,055	23,726
Subtotal:----	2,262	2,825	20,276	20,567	40,849	3,456	3,914	29,931	29,688	59,649
FRT&VEG JUICE (SSE) KL										
GRAPEFRUIT JU CNC	10,181	4,316	33,724	16,767	60,686	5,973	4,300	20,738	16,140	36,980
ORANGE JU NT CNC	7,937	9,498	49,296	60,546	92,328	5,769	6,623	37,851	41,395	68,746
ORANGE JUICE CNC	39,452	20,988	187,462	122,489	349,883	14,111	14,219	75,446	77,565	140,737
OTHER JUICES	28,197	31,100	207,016	186,928	363,216	17,265	21,225	118,585	126,792	214,146
Subtotal:----	85,769	65,905	477,499	386,732	866,115	43,120	46,369	252,622	261,892	460,611
VEGETABLES FR MT										
ASPARAGUS, FR, CHLD	5,278	6,614	13,513	15,917	21,288	17,434	20,187	42,947	52,857	62,514
BROCCOLI	12,285	12,622	66,886	82,248	102,948	7,982	6,941	45,562	49,090	69,469
CAULIFLOWER	7,144	8,936	43,607	58,928	70,346	5,301	5,356	31,182	37,410	49,628
CELERY	12,011	10,899	75,477	76,279	115,257	5,144	2,911	37,492	23,391	51,058
LETTUCE, FR, CH.	24,970	28,236	197,821	196,761	315,002	19,827	10,569	103,139	76,554	154,873
ONIONS, FR	7,551	9,554	81,706	69,872	183,005	4,875	3,562	35,377	31,079	71,840
PEPPERS	3,948	4,852	38,453	30,207	60,961	5,567	3,818	28,083	25,424	48,485
TOMATOES, FR, CH.	10,102	12,056	92,897	77,338	167,332	8,211	7,105	78,796	65,666	133,834
OTHER VEG, FR.	60,983	64,086	291,350	304,310	638,995	33,485	30,795	190,245	190,539	355,598
Subtotal:----	144,277	157,859	901,715	911,864	1,675,138	107,831	91,247	592,828	552,015	997,304
VEGETABLES CANNED MT										
CATSUP & CHILI SA	2,811	3,237	13,982	16,299	23,641	1,953	2,369	10,967	13,414	18,526
SWEET CORN CANNED	16,506	11,174	105,842	94,293	176,881	12,043	8,810	78,383	74,851	132,161
TOMATO PASTE	4,727	4,817	40,477	44,181	73,238	3,908	4,163	32,284	36,537	59,815
TOMATO SAUCE	5,933	6,011	39,668	45,576	68,893	5,435	6,409	38,070	46,779	65,694
OTHER CANNED VEG.	21,188	15,420	130,602	119,166	229,781	25,693	19,680	159,884	149,529	278,154
Subtotal:----	51,166	40,662	330,573	319,517	572,436	49,034	41,432	319,591	321,113	554,351
FROZEN VEGETABLES MT										
FROZEN FRENCH FRY	17,214	22,143	119,077	141,183	211,387	12,219	15,864	84,503	101,032	149,434
FZN SWT CORN	4,662	5,089	36,374	37,942	62,107	3,750	4,438	29,804	33,374	50,528
OTHER POT. FZN	1,919	1,617	10,266	12,172	18,656	1,375	1,355	8,106	9,843	14,968
OTHER FZN VEG	6,637	4,935	34,589	31,621	60,509	6,120	4,396	32,573	29,746	57,313
Subtotal:----	30,435	33,786	200,308	222,920	352,660	23,466	26,054	154,988	173,996	272,244
DEHYD VEGETABLES MT										
GARLIC DEHY	605	686	4,138	4,482	7,478	1,500	1,478	9,962	10,734	18,182
ONIONS DEHY	1,712	2,430	12,776	15,509	23,183	3,999	5,314	30,120	34,853	53,986
POTATO DEHYD	2,570	3,549	17,959	23,498	34,315	2,693	3,588	17,505	24,332	35,043
OTHER DEHY VEG.	2,295	1,677	19,862	16,059	32,937	3,517	3,750	29,905	32,710	49,325
Subtotal:----	7,183	8,344	54,738	59,549	97,915	11,711	14,132	87,493	102,632	156,537
TREE NUTS MT										
ALMND SH/PREP	11,047	12,940	104,780	103,613	161,466	40,436	58,915	349,456	480,094	565,786
ALMONDS, UNSHLD	820	973	11,291	8,047	15,878	2,225	2,922	22,086	21,637	32,772
PISTACHIO, UNSHLD	1,066	977	9,472	6,396	12,840	3,099	2,730	31,269	18,405	42,591
WALNUTS, SHLD	507	893	13,181	14,634	16,909	2,339	3,986	43,173	51,196	58,735
WALNUTS, UNSHLD	107	576	29,296	40,234	33,152	253	1,092	59,403	76,912	67,492
OTHER NUTS	5,715	3,985	37,529	39,596	57,568	16,191	11,213	108,760	116,120	168,454
Subtotal:----	19,266	20,346	205,551	212,523	297,816	64,547	80,861	614,150	764,366	935,834
NURSERY PRODUCTS NONE										
CUT FLOWERS	0	0	0	0	0	4,144	3,707	22,946	22,696	38,122
OTHER NURSERY	0	0	0	0	0	24,761	21,200	110,641	100,971	172,239
Subtotal:----	0	0	0	0	0	28,906	24,907	133,588	123,667	210,362
HOPS & PRODUCTS MT										
HOP EXTRACT	261	231	3,128	3,758	4,027	5,090	2,760	53,370	43,783	66,837
HOP PELLETS	263	282	3,471	2,738	5,116	1,926	1,604	21,183	14,666	30,931
HOPS, NSFP	161	130	2,389	1,573	2,521	761	936	14,134	9,202	15,507
Subtotal:----	686	644	8,989	8,071	11,665	7,778	5,301	88,688	67,651	113,275
WINE KL										
GRAPE WINES	9,938	10,648	64,339	63,749	117,688	13,744	14,427	89,492	92,519	165,337
OTHER WINE PRODUCTS	726	503	8,921	6,291	14,839	896	854	4,903	6,297	11,242
Subtotal:----	10,664	11,151	73,260	70,040	132,527	14,641	15,282	94,396	98,817	176,580
MISCELLANEOUS KL										
BEER & BEVERAGES	33,420	57,304	210,140	245,143	414,388	20,219	37,775	131,943	153,541	259,492
EDIBLE PREPARATIONS	11,413	15,625	69,232	88,420	124,809	48,912	49,071	240,724	305,181	450,622
GINSENG	44	33	810	698	894	5,336	2,431	95,011	62,913	104,376
POTATO CHIPS	4,484	4,023	26,762	31,502	47,774	8,904	12,483	64,819	89,415	118,430
OTHER MISC.	0	0	0	0	0	17,299	20,799	121,641	133,117	211,147
Subtotal:----	49,363	76,987	306,946	365,764	587,867	100,671	122,561	654,141	744,170	1,144,069
Grand Total:						621,050	653,059	4,193,976	4,528,773	7,298,750

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
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NAME		QUANTITY					VALUE (1,000 DOLLARS)				
GROUP & COMMODITY		CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT	MT										
APPLES		20,556	18,330	57,229	43,842	119,770	12,843	10,365	25,198	22,120	70,726
AVOCADO		53	70	16,481	6,756	18,470	83	123	11,871	4,258	12,899
BANANA		263,687	277,812	2,020,189	1,994,996	3,536,585	79,071	83,419	573,997	547,133	1,004,787
CANTELOUPE		54,822	62,620	182,752	196,966	213,007	16,917	18,431	58,605	58,552	67,635
GRAPE		40,055	52,727	281,439	265,079	325,134	27,698	38,767	204,744	201,584	261,626
KIWIFRUIT		6,759	6,855	8,263	8,705	24,791	3,801	4,444	5,407	6,026	16,602
MANGO		16,462	15,384	28,678	25,316	110,290	14,930	15,244	27,569	25,918	84,344
PEACH		140	24	41,162	42,931	41,376	217	14	26,228	27,662	26,410
PEAR		11,872	10,582	50,291	47,534	64,825	5,288	5,374	23,962	24,369	32,038
PINEAPPLE		10,193	8,387	70,828	65,767	124,177	3,662	2,872	25,720	23,178	46,139
STRAWBERRY		2,947	5,618	11,377	15,291	14,470	3,028	9,916	19,917	30,577	22,158
OTHER MELON		22,496	20,210	99,148	98,926	114,510	8,203	7,091	36,601	36,057	41,350
OTHER FRUIT		60,096	83,697	326,372	344,206	512,714	18,338	31,582	134,498	155,253	205,691
Subtotal:----		510,144	562,321	3,194,214	3,156,322	5,220,125	194,084	227,650	1,174,323	1,162,694	1,892,412
DRIED FRUIT	MT										
DRD APRICOT		452	630	7,056	6,120	11,053	935	1,607	16,190	15,929	25,135
DRD FIG & PASTE		292	1,122	6,326	8,037	8,786	345	1,190	8,980	9,928	10,808
OTHER DRD FRUIT		1,698	2,190	17,668	15,489	29,643	2,207	3,064	19,791	21,938	36,546
Subtotal:----		2,443	3,943	31,051	29,647	49,483	3,488	5,862	44,962	47,795	72,490
FROZEN FRUIT	MT										
FZN BLUEBERRIES		309	888	2,808	4,774	5,677	576	1,388	5,314	6,968	9,926
FZN STR		4,180	3,216	12,811	11,897	19,937	4,177	3,311	14,218	12,703	21,271
OTHER FZN FRUIT		3,274	3,120	16,028	19,315	32,037	3,135	3,760	16,853	21,886	34,039
Subtotal:----		7,764	7,225	31,649	35,987	57,651	7,889	8,461	36,386	41,558	65,236
CANNED/PREP FRUIT	MT										
CANNED OLIVES		5,530	5,718	44,139	41,091	74,492	12,749	13,295	94,917	88,023	153,316
CANNED ORANGES		3,985	4,735	21,557	26,705	41,806	3,589	3,694	20,744	21,030	39,502
CANNED PEACH		482	1,057	17,111	14,370	23,011	298	606	11,875	7,930	15,375
CANNED PINEAPPLE		29,831	28,821	192,112	195,099	344,866	19,579	16,669	123,085	110,777	212,896
MIXED FRUIT		2,818	2,415	21,441	25,128	33,405	2,649	2,001	19,229	21,187	29,875
PREP/PRES FRUIT		4,649	4,958	31,848	33,964	58,233	5,516	5,294	37,224	38,729	66,860
OTHER CANNED FRUIT		5,032	5,103	25,758	33,468	47,278	6,495	6,377	35,126	43,841	60,772
Subtotal:----		52,330	52,809	353,970	369,829	623,093	50,878	47,938	342,203	331,520	578,600
FRT&VEG JUICE (SSE)	KL										
APPLEPEAR JU		66,711	85,751	442,542	537,280	946,807	18,059	16,205	135,668	105,453	243,682
FCOJ		60,633	144,950	634,814	1,029,003	1,122,350	7,673	30,237	108,031	205,606	191,591
GRAPE JU		13,171	9,640	87,842	38,408	148,404	4,865	4,365	32,278	14,856	52,117
PINAP JU		34,731	18,410	197,870	173,975	339,270	8,082	4,196	46,942	39,055	77,767
OTHER FRUIT JU		13,722	17,336	80,251	99,475	149,384	7,221	9,300	43,575	57,544	77,630
Subtotal:----		188,970	276,090	1,443,321	1,878,143	2,706,217	45,901	64,305	366,496	422,515	642,789
FRESH VEGETABLES	MT										
GARLIC		2,542	3,037	7,454	21,221	29,171	2,661	2,599	8,307	14,486	23,144
ASPARAGUS		1,125	792	23,768	20,620	29,852	1,513	1,202	33,407	32,415	39,213
BELL PEPPER		10,074	10,862	99,255	100,138	121,859	16,139	13,272	88,975	104,881	129,247
CARROTS		2,185	3,180	38,824	44,335	51,431	657	923	10,555	10,738	14,066
CHILI PEPPER		4,020	5,126	24,244	27,846	36,933	5,226	3,679	32,630	28,074	48,709
CUCUMBER		15,285	20,355	216,878	219,584	238,841	8,280	8,231	72,493	91,607	85,192
ONIONS		34,352	34,340	164,843	209,607	218,400	15,747	16,919	74,416	107,614	104,818
POTATO, INCL SD		63,596	58,051	240,541	270,786	302,186	11,010	12,580	38,142	60,522	49,596
SQUASH		8,899	9,817	84,626	90,156	95,290	5,519	5,290	76,682	50,819	87,590
TOMATOES		61,616	46,633	289,458	307,282	380,911	38,892	25,041	229,297	255,640	307,454
OTHER FRESH VEGETAB		29,696	21,988	197,710	180,279	285,285	16,635	13,704	112,017	113,393	156,317
Subtotal:----		233,394	214,184	1,387,606	1,491,860	1,790,165	122,284	103,445	776,927	870,193	1,045,351
CANNED/DEHYD VEGET	MT										
CND ARTICHOKE		1,176	2,333	7,427	10,043	20,456	1,884	3,673	11,856	16,081	32,256
CANNED BAMBOO		1,842	2,898	17,565	19,433	28,680	1,636	2,397	15,410	15,370	24,939
CND MSHROOMS		3,784	7,013	29,435	32,927	47,213	7,674	13,875	63,556	65,815	100,977
CND PIMIENTO		541	334	3,897	3,867	6,172	662	395	5,910	4,556	8,532
CND TOM		3,757	3,558	26,841	21,403	45,500	1,551	1,453	10,071	7,903	17,799
CANNED WATERCHESTNU		3,008	4,966	17,892	18,822	39,558	2,103	3,234	12,502	13,374	27,926
TOMATO PASTE & SAUC		9,914	11,481	23,369	24,406	40,209	7,601	8,089	16,163	18,128	27,282
DRIED MUSHROOMS		150	105	1,013	812	1,817	1,815	993	13,877	9,704	22,462
DRIED TOMATOES		519	355	4,024	3,827	6,491	2,089	1,469	16,386	14,452	25,842
OTHER DEHYD VEGETAB		6,531	9,784	48,201	53,888	89,437	4,716	5,410	34,865	32,910	61,180
OTHER CND VEG		15,194	18,420	117,421	126,701	197,571	17,027	18,010	121,390	132,424	208,971
Subtotal:----		46,421	61,253	297,091	316,135	523,108	48,766	59,002	321,992	330,723	558,172
FROZEN VEGETABLES	MT										
BROCCOLI FZN		17,543	13,211	120,920	81,499	170,431	11,456	9,360	80,697	56,952	113,224
CAULIFLOWER FZN		485	447	18,567	25,190	22,290	333	297	13,193	21,500	15,842
POTATO FZN		12,331	11,676	71,073	76,181	125,895	6,853	6,376	39,614	42,458	69,284
OTHER VEG FZN		194,069	281,686	823,561	1,282,698	1,671,650	7,760	9,629	53,443	60,979	88,516
Subtotal:----		224,430	307,022	1,034,122	1,465,569	1,990,268	26,403	25,664	186,948	181,890	286,869
TREE NUTS	MT										
BRAZILS TOT		837	337	4,673	3,390	10,429	1,120	772	6,888	7,335	15,171
CASHEWS TOT		3,086	4,803	39,033	36,968	64,377	12,438	20,885	157,476	155,965	260,328
COCONUT		4,416	5,886	33,375	40,160	59,768	3,631	4,968	27,882	32,518	49,330
PECANS		631	1,103	16,620	10,907	20,305	4,326	2,967	64,564	24,579	88,874
OTHER NUTS		1,760	800	12,968	11,396	21,106	5,796	3,093	43,320	39,113	73,209
Subtotal:----		10,731	12,931	106,672	102,824	175,987	27,313	32,686	300,132	259,512	486,914
NURSERY PRODUCTS	M										
CARNATIONS		120,799	148,483	618,413	703,743	920,969	11,021	12,735	55,238	61,079	82,772
CHRISTMAS TREES		1	1	1,990	2,026	1,995	8	24	17,267	17,091	17,286
CHRYSANTHEMUMS		15,722	66,370	86,667	347,119	159,073	7,269	6,970	39,067	44,140	66,054
ROSES		75,808	77,844	378,335	428,471	584,669	12,827	14,471	69,172	80,743	102,915
TULIP BULBS		0	1	65,749	64,785	284,022	0	2	7,859	7,806	32,959
OTHER CUT FLRS		0	0	0	0	0	12,729	11,560	67,831	76,238	106,414
OTH NURS PROD		0	0	0	0	0	17,025	15,799	131,364	136,788	215,556
Subtotal:----		212,332	292,702	1,151,156	1,546,147	1,950,730	60,881	61,564	387,800	423,887	623,959
HOPS & PRODUCTS	MT										
HOPS & PELLETS		516	32	3,614	4,672	3,982	3,841	227	19,996	30,090	22,237
OTHER HOP PRODS		0	2	6	557	134	7	23	76	3,293	933
Subtotal:----		516	34	3,620	5,230	4,116	3,848	250	20,072	33,384	23,171
WINE	KL										
RED WINE		9,256	9,172	56,420	63,709	98,370	40,343	31,504	221,601	218,467	379,584
SPARKLING WINE		1,747	1,345	19,081	19,856	29,680	17,351	13,832	157,424	167,611	251,670
WHITE WINE		7,068	8,603	53,589	58,037	92,358	20,217	24,601	166,829	170,997	279,901
OTHER WN PROD		2,041	2,179	12,910	15,626	23,752	5,344	5,893	32,786	41,873	60,012
Subtotal:----		20,114	21,300	142,002	157,230	244,162	83,256	75,832	578,642	598,949	971,169
MISCELLANEOUS	KL										
BEER & BEVERAGES		86,781	116,547	575,458	686,894	1,119,446	76,668	95,372	490,707	560,547	952,084
OTHER MISC.		0	0	0	0	0	60,004	65,841	409,579	437,305	720,413
Subtotal:----		86,781	116,547	575,458	686,894	1,119,446	136,673	161,214	900,287	997,853	1,672,498
Grand Total:							811,670	873,879	5,437,177	5,702,480	8,919,637

U.S. fresh vegetable exports to Japan hitting record levels.

U.S. fresh vegetable exports to Japan in calendar year 1993 soared from $79.5 million in 1992 to $114.0 million. Fresh asparagus exports led the way with a value of $30 million, up 25 percent; followed by broccoli, $23 million, up 64 percent; cauliflower, $19 million, up 27 percent; and onions, $9 million, up 469 percent from 1992. Other important U.S. fresh vegetable exports to Japan in 1993 that also registered increases included: lettuce, kohlrabi, cucumbers, chicory, onion sets, beans, and celery.

U.S. fresh vegetable exports to Japan during the first 4 months of 1994 have already reached a 5-year record level of $66.3 million, up 70 percent from the same period in 1993. Fresh asparagus accounted for the lion's share with about 50 percent of the total value. Sales of fresh broccoli and cauliflower are up 160 and 150 percent, respectively for the first 4 months of 1994 compared to sales during the same 4-month period over the previous 5 years.

Increased potential for U.S. apples in Gulf Region.

Unsuitable weather conditions will cause a 30 to 40 percent reduction in this year's apple crop in Iran, according to the U.S. Agricultural Trade Office (ATO) in the United Arab Emirates. This factor is expected to increase demand for U.S. apples in Gulf markets, which have a reputation for high quality in the region. The ATO estimates that imports of U.S. apples, which have averaged about 3,000 tons the last 3 years, could reach 6,000 tons in 1994. Iran's annual apple production is estimated at about 1 million tons, with Golden varieties accounting for about 70 percent. Gulf states, former Soviet republics, and Far Eastern countries are the largest markets for Iranian apple exports.

Changes in Japanese law could increase demand for U.S. hops.

Recent changes in Japanese law reportedly would permit the establishment of smaller breweries. Many of these breweries will likely demand U.S. hops, in an effort to differentiate their products in the competitive Japanese market. U.S. hop exports to Japan during the current marketing year (Sep-Apr) are valued at $3.2 million, about 17 percent ahead of last year's pace for the same period.

Rise in GSM-102 applications depletes hops line for Mexico; coverage offered for fresh fruit and hops increased.

Since last month's report, $3.0 million in additional coverage for fresh fruit and hops was authorized for Mexico under the GSM-102 credit guarantee program. This action enabled the approval of applications totaling $3.0 million for canning peaches to that market. This marks the first transaction for fresh fruit under the GSM-102 program in FY 1994. Applications were also approved for the remaining $3.3 million of coverage available for hops (pellets and extract) to Mexico. In anticipation of further sales to Mexico, an additional $1.0 million was re-allocated to hops. Apart from this, there was no other horticultural activity under the program during the reporting period.

FY 1994 GSM-102 Credit Guarantee Coverage 1/

Country/ Commodity	Announced Allocations FY 1994 ($1,000)	Exporter Applications Approved ($1,000)	Balance ($1,000)
Colombia			
Fresh fruits 2/	500	0	500
Tree nuts	500	0	500
Indonesia			
Potatoes 3/	2,000	0	2,000
Mexico			
Almonds	1,000	0	1,000
Fresh fruits 2/	3,000	3,000	0
Hops	7,500	6,500	1,000
Tunisia			
Almonds/Walnuts	500	0	500
Raisins	500	0	500
Venezuela			
Fresh Fruits 4/	2,000	0	2,000

1/ Coverage through June 24, 1994.
2/ Apples, pears, plums, peaches, nectarines, and strawberries.
3/ Cut for french fries.
4/ Apples, pears, plums, grapes, cherries, and peaches.

World Trade Situation and Policy Updates

The United Arab Emirates will levy a 4 percent duty on certain food products.

On August 1, 1994, the United Arab Emirates (UAE) will levy a 4 percent duty on a limited number of imported food products, including canned vegetables, canned fruits, frozen fruits, and juices. Fresh fruits and vegetables will be exempt from the new duty. According to UAE officials, the duty revenue will help maintain the services provided by UAE ports and other government operations. Government and trade contacts in Dubai expect the action to have little impact on U.S. food exports to that country because of the duty's small size relative to those collected by neighboring countries. Currently, the UAE imposes no duty on food imports.

Egyptian plant quarantine concerns linger following apple delegation visit to Washington State.

Egyptian concerns about U.S. pest risk inspection and certification procedures for apples remain following the June 8 - 12 visit of an Egyptian delegation of plant quarantine officials, led by Egypt's Undersecretary for Plant Quarantine, to Washington State apple production areas and packing facilities. The visit was prompted by a recent incident in which a shipment of 44,000 boxes of Washington State apples was rejected upon arrival in Egypt due to the detection of dead insects. Egypt currently has a regulation identifying dead pests as a quarantine concern. During the delegation's visit, representatives of FAS/HTP, APHIS, and the Northwest Horticultural Council attempted to convince the

Egyptians that current Washington State apple inspection procedures and certification alleviate the risk of pest and disease transmission. In meetings held with the delegation after the trip, it was agreed that USDA and Egyptian officials would continue to work together in an effort to resolve the issue.

United States horticultural exports to Korea still face many phytosanitary-related access problems.

Bilateral discussions between USDA (APHIS and FAS) and Korea's National Plant Quarantine Service (NPQS), held in Seoul June 2-3, addressed a range of horticultural trade-related issues. Based on the information exchanged at the meetings, the United States will likely be able to meet Korea's phytosanitary import requirements for <u>fresh oranges</u> and <u>grapes</u> after import licensing restrictions, which currently block entry of these products, are lifted in 1995 and 1996, respectively, as called for under Korea's Uruguay Round Agreement commitments. However, the near term outlook for access for U.S. <u>apples</u>, <u>pears</u>, <u>stone fruit</u> and <u>papayas</u> is less favorable. NPQS has cited the need for extensive assessments of related pest and disease concerns before import approval can be considered. Currently, the only U.S. fresh horticultural products that can enter Korea are lemons, grapefruit, avocados, kiwifruit, and cherries.

INDONESIA'S HORTICULTURAL INDUSTRY AND THE COMPETITION OUTLOOK IN WORLD MARKETS

[Note: This is the fourth competition article in a series. New Zealand was featured in the June issue, India in May, and Australia in April.]

Indonesia has recently attracted considerable attention as one of Asia's new emerging markets. What is less appreciated are efforts in Indonesia to develop an export industry for horticultural products and commodities. Although noted for its wide array of tropical fruits and vegetables, Indonesia is also producing an increasing variety of temperate climate horticultural crops for both local consumption and export markets. With an abundant agroclimatic endowment, government and private investment in basic infrastructure, and a robust economy assisted by regular deregulation packages, Indonesia is poised to expand its export capability. However, like several other countries in Southeast Asia that are endowed with adequate land resources, the transition to regional exporter of horticultural commodities and products will not be easy. Indonesia faces a number of challenges including: 1) raising labor productivity; 2) improving quality control and competitiveness; and, 3) establishing itself as a reliable supplier to an increasing number of export markets.

Overview of Indonesia's Horticultural Industry

This report focuses on export prospects for temperate climate vegetables, both fresh and processed. Two reports in this series (Australia and New Zealand) have presented developments in competitor countries with mature export industries. Like India, Indonesia is an example of an emerging economy country that is beginning to turn its attention to exporting high-value horticultural products.

Although Indonesia's agricultural sector is dominated by bulk commodities for export (e.g., palm oil, coffee, cocoa), there is also considerable production of horticultural crops. Indonesia's diverse agroclimatic endowment allows for a wide range of temperate vegetables and fruits at higher elevations on Java and Sumatra. Official export value of combined fresh and dried fruits and vegetables (both temperate and tropical) in 1992 was approximately $252 million, a nine-percent increase over the previous year. This figure is probably conservative, as there is considerable regional trade in these commodities that goes unreported in parallel shipments. The following table presents production and export data for selected vegetables. The bulk of Indonesia's exports of horticultural commodities is bound for regional markets, although there is a growing trade with Europe in high value air-flown vegetables.

INDONESIA: Production of Selected Horticultural Commodities (Hectares; Metric Tons 1/)

Commodity	Area	Production	Exports
Tomatoes	46,000	240,000	2,666
Potatoes	41,000	554,000	96,470
Cabbages	58,000	1,000,000	56,856
Eggplants	53,000	160,000	409
Leeks/Onion	76,000	530,000	2,507

Source: FAO data reported by Government of Indonesia.
1/ Data are for 1992.

GOVERNMENT ASSISTANCE FOR EXPORTS

Indonesia's export promotion is primarily in the hands of the private sector, with little if any direct assistance coming from government. Over the past 3 years there has been a flurry of activity by Indonesia to promote investment in horticulture and agribusiness. The newly-created Directorate General of Agribusiness under the Minister of Agriculture attests to Indonesia's interest in this sector. Part of this concern is rooted in how to improve rural incomes. Horticulture offers some appeal, especially on crowded Java, where about 60 percent of Indonesia's 190 million live and the average land holding is only 0.3 hectares. Horticultural processing also holds promise for increasing the value-added component of agriculture and expanding the number of off-farm rural jobs. A recent GOI study found that Java's farm households earn about 60 percent of annual income from off-farm employment.

Perhaps one of the government's major contributions has been in the area of improving basic infrastructure. For example, Indonesia has embarked on a plan to expand and modernize container ports and airports, increase availability of electric power and telecommunications, and improve roads. These factors should boost Indonesia's ability to compete in export markets for horticultural products.

VEGETABLE EXPORTS BOOM AS ENTREPRENEURS INVEST

Several private companies have invested in production of temperate climate vegetables for both export and upscale local supermarkets. Prominent among the estimated 40 different vegetables are eggplants, cabbages, peppers, and leeks (see following table). Some of the vegetables are processed slightly before shipping, a portion of which receives IQF (individual quick freeze) treatment. According to one exporter, IQF is popular in Japan and other high-value markets. The costs of this technology are reportedly low due to excess capacity in shrimp processing facilities, resulting from rapid expansion and subsequent stagnation of the export business.

Export companies are primarily joint-venture operations with foreign partners. Contracts are typically set with either individual farmers or farmer groups for delivery of vegetables of certain specifications. Although at least two companies have seed multiplication facilities, most vegetable seed is imported to ensure acceptability by importer. These operations are characterized by a high degree of control from planting through marketing. In most cases, farmers are provided all inputs and receive regular extension services during the production cycle. Entrepreneurs note that maintaining consistent quality is a persistent concern, as most small-scale farmers incorrectly assume that specifications have wide tolerances. Importers are reportedly extremely strict and demand the highest standards of quality, hygiene and availability. As a result, a large percentage of farmers' produce does not make export grade. In most cases, this portion can be marketed through contracts with supermarkets or by wayside vegetable vendors, although at a price

discount.

The following table shows that exports of fresh or chilled vegetables have risen steadily over the past few years. Although starting from a low base, Indonesia has established itself as a regular supplier of a variety of fresh vegetables. The data mask the tremendous growth in shipments to non-traditional markets such as Japan and members of the EU. Japan is often cited as the ideal target market. This is a logical choice, given Japan's aging farm population and the possibility of improved access for agricultural imports. There have also been steady gains in exports to regional markets such as Malaysia and Singapore.

INDONESIA: Exports of Selected Fresh Vegetables (Metric Tons 1/)

Commodity	1989	1990	1991	1992
Asparagus	0	46	157	310
Cabbages	29,936	25,512	28,175	56,856
Eggplants	n/a	82	113	409
Leeks	1,537	1,249	1,149	2,507
Mushrooms	3	58	544	1
Potatoes	71,350	76,775	98,177	96,470
Shallots	1,737	4,062	10,376	7,843
Peppers	0	13	350	612
Tomatoes	2,906	1,444	1,810	2,666

Source: Government of Indonesia, Bureau of Statistics

HORTICULTURAL PROCESSING BOOSTS VALUE-ADDED COMPONENT AND CREATES JOBS

Indonesia has an emerging horticultural processing industry. Over the past 20 years there has been expansion at virtually all levels, from large joint-venture operations to small, tightly-held family businesses. The Indonesian Association of Food and Beverage Processors (GAPMMI) has been very active in organizing seminars on agribusiness topics in horticulture. GAPMMI's focus has been on developing tropical horticulture for processing; however, there is reportedly broad-based interest in temperate climate fruits and vegetables both for local market and export.

Government deregulation of the economy since 1987 has encouraged private investment in food processing activities. Sustained economic growth and stability are factors which have motivated entrepreneurs to improve product quality and seek export markets. As with fresh vegetables, Indonesia's huge population provides a ready market for processed horticultural items of all kinds. Therefore, the expanding domestic market is usually the primary focus, with export markets serving a secondary role. As product quality improves, there will likely be greater access to export markets.

Indonesia is a Major Player in the Mushroom Boom

Indonesia is a major supplier of canned mushrooms, although growth in exports of processed mushrooms has flattened somewhat in recent years due to increased competition from other suppliers (e.g., China). The bulk of the $100 million export mushroom industry is controlled by three companies. Increased competition is reflected in the drop of FOB prices over the past five years: $30/case (24 eight ounce cans) in 1989 to $14/case in February 1994. This decline led to cut-backs in production throughout the industry. Major markets for Indonesia's canned mushrooms include the United States, Canada, and Japan. Indonesian companies pack for a variety of U.S. retail chains.

Sauces and Juices are also Important

Other export products include sauces and preparations of tomatoes and chili peppers. At least three food processors pack international brands under licensing agreements. These same firms export their own label products to markets around the world. An increasing element of trade with both European and regional markets is fruit juice, usually marketed in individual serving tetrapacks. Export value in 1992 was about $5.0 million. Fruit juices are typically made from imported concentrates (e.g., grape, apple, orange, and mango) because local production has not yet come up to speed. Thus, there is some scope for exports of juice concentrates to Indonesia.

Foreign Investment in Horticultural Processing

Government policy over the past several years has been to encourage foreign investment in Indonesia through "deregulation and debureaucratization." This has meant liberalizing investment regulations, reducing tariffs and import licensing restrictions, easing export requirements, and revitalizing the banking system and capital markets. Requirements on paid-up capital for 100 percent foreign ownership of firms have also been lowered. All of these policy actions have likely improved Indonesia's ability to attract foreign investment in production and processing of horticultural commodities. Reportedly, there has been considerable interest in horticultural investment, in large part due to the potentially huge local market, but also because of export potential to the economically dynamic Asian region. Indeed, there has been interest from U.S. firms in establishing trade-led joint ventures in fruit and vegetable processing.

PROSPECTS FOR OTHER HORTICULTURAL CROPS

In addition to temperate climate vegetables, there is a range of other horticultural crops that could be developed for both local and export markets.

Cut Flowers Show Promise

Cut flowers are an example of one potential area for export expansion. Indonesia's trophy-winning floats in the past several Rose Parades have helped raise its profile in floriculture. A few Dutch and American companies already have business relationships with local companies, with more reportedly in the pipeline.

Indonesia has a long tradition of floral gift giving to commemorate important events. Although local demand for cut flowers is quite high, there is also potential for developing export markets for a wide range of high-value flowers. The availability of high altitude land (above 2,000 meters elevation in some areas of Java) makes possible cultivation of many temperate climate flowers, such flowers as chrysanthemums, roses, and gladioli. Indonesia is already a proven exporter of orchid stems (dendrobium), and could develop into a supplier of temperate climate flowers in the near future.

Apples: Once Rooted, Development Now Appears Stumped

Apples offer an example of a local industry that primarily targets the local market. Indonesia produces small quantities (about 100,000 cartons) of apples in the higher elevations of East Java. Development of this industry reportedly took root in 1982 following government prohibition on imports. In this protected environment, the Malang Apple Research Institute focused on distributing planting material based on European rootstock: two mostly green apples ("Malang" and "Manalagi"). There has also been some research into improved waxing and storage techniques for local apples. According to Jakarta-based fruit wholesalers, however, there has been a gap between research and extension to the field.

Production is primarily on a very small scale, with growers tending only a few trees. However, in some areas of East Java there are orchards of 10-20 hectares. Reliable data on area planted are non-existent. Cultural practices include picking the leaves after harvest to force a second crop.

Although comparatively small and not well organized on the production side, Indonesia's apple industry has made great strides in improving packaging and marketing for local consumption. In some years, there are exports

of small-sized green apples ("cherry apples") to regional markets such as Singapore. Apple exports have reportedly averaged only about 1,500 cartons annually over the four year period, 1989-1992.

Now that the government has lifted the import ban and the market for foreign apples has exploded to about 10 times local marketed production, the future direction of Indonesia's domestic industry appears less clear. Some observers note that competition from foreign fruit is good for the local industry, citing improvements in quality and marketing. Others suggest that more funding is needed to develop improved varieties in order to remain competitive in the local market. Little if any expansion in area is expected in the near term due to comparatively high interest rates (16 percent) and the slow return on investment. Continued robust economic performance and a growing middle class have improved prospects for local growers. With most fruit going to local markets, Indonesia will likely remain an exporter of only limited volumes of apples.

CONSTRAINTS TO DEVELOPING HORTICULTURAL EXPORTS

Competition from Low-Wage Regional Suppliers

Indonesia's low wage rates (about $1.50/day) are often cited as a comparative advantage. But this is counter-balanced by low productivity of labor in industry. For vegetable and fruit production this is less problematic than for processing, which is more sensitive to rises in labor costs. According to the results of a survey commissioned by one of Indonesia's leading food processors, Indonesian factory labor is far less productive than labor from competitor markets in Latin America. Within Asia, the shift of capital and industries to countries with lower cost structures is a common occurrence, e.g., processed mushrooms and shrimp. If Indonesia hopes to continue to attract investment for horticultural processing, then labor must be made more efficient.

Land Tenure is Tightly Controlled

Another constraint to development of export horticultural industries is land tenure. The average size of land holdings is estimated at about 0.3 hectares on Java, the island with the best infrastructure. Obtaining clear title to land is a very complicated process. The upshot of this is that units of production are small and uniformity of management is very difficult to achieve. The more successful vegetable operations have comprehensive extension services for their contract farmers. In some areas off Java (e.g., Sumatra), private companies may enter into joint ventures with the government for a fixed fee per kilogram of commodity harvested.

Infrastructure Still Needs Improving

Moving horticultural products from field to export position is becoming more efficient, although challenges remain. Indonesia continues to extend its four-lane highway system across Java. However, roads in most high-elevation production areas still need improvement. Refrigerated trucks are reportedly in short supply; however, capacity of cooling facilities is increasing. The major container port in Jakarta is undergoing expansion, as are ports in Surabaya (East Java) and Medan (North Sumatra). This is an ambitious program and will require government's continued commitment to economic development.

Indonesia will also need to stimulate investment in the full complement of research aimed at identifying and improving varieties with the best market potential. A more responsive extension service will be a necessary part of this effort.

COMPETITIVE OUTLOOK IN THE YEAR 2000

If Indonesia sustains its economic reforms and continues to expand, it will eventually become an exporter of considerable volumes of horticultural commodities, both fresh and processed. Government of Indonesia policy toward agribusiness and infrastructure development will probably expand the variety and availability of Indonesian fresh fruits and vegetables. Regional markets such as Singapore, Malaysia and Japan will likely feature prominently as future export markets. The challenge will be for the GOI to keep economic reforms on track. Indonesia's

presence in export markets with temperate climate vegetables is not yet seen as significant competition for the United States. In the foreseeable future, however, improvements in the quality of locally produced temperate vegetables and fruits will likely dampen import demand as more of these products are retained for the domestic market.

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WORLD FRESH CITRUS SITUATION

Abundant supplies of citrus and less competition from smaller deciduous fruit crops means brighter prospects for fresh citrus exports in 1994. The United States is expected to be a major beneficiary of these increased marketing opportunities, as good late season crops and aggressive marketing promotion help move fruit into the export market. U.S. fresh citrus exports in 1993/94 consequently are forecast at a record 1.18 million tons.

Summary

Citrus production in selected countries in 1993/94 is forecast at 60.65 million metric tons, 1 percent below the 1992/93 record crop, but still a high level. Lower-than-anticipated citrus crops in Argentina, Italy, Japan, Mexico, Spain, and the United States account for this decrease. Orange production in 1993/94 is forecast at 39.53 million tons, down 2 percent from 1992/93. The declines in many Northern Hemisphere countries are likely to be partially offset by the increases forecast for Brazil and Australia. A record tangerine crop in China and steady output in other producing countries are expected to push tangerine production to an all-time high of 11.66 million tons. Total grapefruit production is estimated to decline 3 percent to 3.67 million tons, primarily due to downward revisions in the crop estimates for Turkey and the United States.

Citrus exports for selected countries in 1993/94 are forecast at 7.4 million tons, 2 percent above last season's volume. Increased shipments of oranges, grapefruit, and lemons are expected to offset declines in tangerines and other citrus. Spain accounts for most of the increase in orange exports. The United States and Cuba account for nearly all of the increase in grapefruit exports. Argentina will account for most of the increase in lemon exports.

Citrus for processing in 1993/94 is forecast at 25.0 million tons, 3 percent below 1992/93. Decreased orange processing prospects in the United States, Spain, and Mexico more than offset an expected higher orange crush in Brazil. A smaller Florida orange crop is the reason for lower processing in the United States.

Southern Hemisphere

Total citrus production in selected major producing countries in the Southern Hemisphere in 1994 (corresponds to 1993/94 in the tables in the statistical section) is forecast at 18.8 million metric tons, slightly above the previous season's output. A projected 2-percent increase in orange production in the Southern Hemisphere, mainly from Brazil, is expected to more than offset decreases in tangerine and lemon production. Orange production accounts for more than 85 percent of total Southern Hemisphere citrus output.

Fresh citrus exports by selected Southern Hemisphere countries in 1994 are forecast at 851,000 tons, 7 percent above shipments in 1993. Export increases are forecast for all types of citrus, except for tangerines and for the "other citrus" category, which includes mostly limes. The largest gain is expected for lemons exports. Argentina accounts for almost all of the lemon export increase.

Citrus for processing in selected Southern Hemisphere countries in 1994 is forecast at 12.1 million tons, or 2 percent above the 1993 level. Brazil accounts for nearly all of the expected increase in processing. An increase in processing in the Northern region is the reason for the expected climb in processing in Brazil.

Brazil

Total Brazilian citrus production in 1994 (harvested May through December) is forecast at 15.65 million tons, marginally above the 1993 harvest which has been revised upward to 15.41 million. Orange production is expected to increase slightly, to 14.36 million tons, due to favorable weather in production areas outside of Sao Paulo. However, orange production in Sao Paulo is forecast down 1 percent, to 12.24 million tons, due to yield reductions resulting from hot, dry weather during the flowering stage, reduced grove care, and scattered blossom blight that caused early fruit drop.

Oranges represent the bulk of the Brazilian citrus crop, accounting for approximately 92 percent of total output and 98 percent of processing. Brazil's orange production is located predominantly in the state of Sao Paulo which accounts for over 80 percent of the national output. The Sao Paulo market is dominated by the juice processing industry, while orange production in areas outside of Sao Paulo move mostly to the fresh market. The Pera and Natal varieties account for the bulk of oranges produced in Sao Paulo. For more information on Sao Paulo orange crop and orange juice situation see citrus "update" in the June issue of **World Horticultural Trade and U.S. Export Opportunities**.

More oranges are expected to be processed in Brazil in 1994 based on the expected larger orange crop from producing areas outside of Sao Paulo. Orange processing outside of Sao Paulo is predominantly located in the northeastern state of Sergipe. In Brazil, orange production largely moves to the frozen concentrated orange juice (FCOJ) processing sector. However, more oranges will be destined to the fresh market in 1994 as producers attempt to take advantage of higher fresh market prices. Local fresh consumption is growing due to increasing promotion and sales of "fresh squeeze" juice machines in local stores.

Argentina

Citrus production for 1994 is forecast at 1.7 million tons, down 4 percent from 1993. Excessive rain in Corrientes Province reduced orange production to 630,000 tons, 5 percent below last year. The 1994 lemon crop is forecast down 7 percent, to 550,000 tons, because of inclement weather in Tucuman province where more than 70 percent of Argentina's lemons are produced. Argentina's major lemon varieties include Eureka, Genova, Lisboa, and Limoneira 8-A. Tangerine production is forecast at 348,000 tons, up slightly from the weather- reduced crop of 1993. In contrast, grapefruit production is forecast down due to higher-than-normal incidence of disease problems resulting from cutbacks in orchard care.

Most of Argentina's citrus production is processed or consumed fresh by the domestic market. Only about 12 percent, mainly oranges and lemons, are exported. Total citrus exports in 1994 are forecast to increase by 15 percent over the 1993 volume due to an expected boost in lemon exports. Argentine lemon exports in 1993 totaled about 42,000 tons or about 40 percent less than in 1992. The main reason for this decline in exports was world oversupply and lower Argentine fruit quality. However, lemon shipments in 1994 are forecast to increase to 71,000 tons based on the larger lemon crop, improved fruit quality, and Argentina being in a more competitive position to export to Europe due to the smaller and delayed Spanish crop. Moreover, export prospects are also improving to the Far East, especially to Hong Kong, Singapore, and Taiwan. The Netherlands is Argentina's principal lemon export market, followed by France, Canada, and the United Kingdom.

Argentina's citrus for processing is forecast to decline by 5 percent in 1994 to 706,000 tons as more fresh lemons are expected to be exported. About 70 percent of the Argentine lemon crop is processed annually.

South Africa

South Africa's total citrus production in 1994 is expected to remain relatively unchanged at 822,000, with a small decrease in orange production offset by slight increases in grapefruit and lemon output. Orange production for 1994 is forecast at 660,000 tons, down 4,000 tons from last season due to continuing drought in the northern Transvaal--the largest citrus production area in the country. The shortage of irrigation water in this region has resulted in significant

tree loss. However, new plantings elsewhere in the country are now bearing fruit, cushioning the country's total citrus decline. Oranges are the major citrus produced in South Africa, accounting for 80 percent of total citrus production.

South Africa's citrus exports in 1994 are forecast at 434,000 tons, 3 percent above 1993. Some improvement is expected in all citrus exports due to the devaluation of the South African Rand. South Africa's citrus industry is oriented toward the export market. About 55 percent of the oranges, 45 percent of the lemons, and more than 50 percent of the grapefruit produced are exported. South Africa sells citrus to over 40 countries but the bulk of the fruit goes to Europe.

Citrus for processing is forecast to decrease 10,000 tons in 1994. The processing industry is being hampered by smaller crops and consequent shortage of cheap fruit in the market. Fresh citrus consumption is limited because of a relatively small population, low income levels, unemployment, and the poor current state of the economy.

Australia

Citrus production in 1994 is forecast up 8 percent to 657,000 tons--a fairly normal upturn following an "off-year" in the production cycle. The 1993 crop was constrained by poor yields and smaller-than-normal fruit sizes mainly because it followed the large 1992 harvest.

Favorable weather and a 3-percent increase in the number of bearing trees are expected to boost Australia's 1994 orange crop to 622,000 tons. Additional plantings of navel oranges have more than offset decreased plantings and removals of valencia trees. With the increase in production of navel oranges, Australia's citrus industry is moving away from the lower returns characteristic of the processing sector and toward the more lucrative fresh domestic and export markets. Bearing valencia trees currently account for approximately 54 percent of Australia's total number of bearing citrus trees, while navels account for 32 percent. It is projected that, by 1998, the number of bearing navel trees will account for 41 percent of the total.

Total Australian citrus exports in 1994, about 90 percent oranges, are forecast at 117,000 tons, up 15 percent from shipments in 1993. Fresh orange exports in 1994 are expected to increase 15 percent to 115,000 tons. Increased orange exports are likely due to stronger demand in South East Asian markets. Malaysia, Indonesia, Singapore, and New Zealand are the major destinations for Australian oranges. Australian exports have been aided by the Australian Horticultural Corporation (AHC), which was developed to promote and coordinate the marketing of the Australian horticultural industry. The AHC recently announced a promotional campaign for valencia oranges. The campaign theme will be "Australian Valencias- Juicier by Far". The campaign will be centered on in-store promotional activity, combined with magazine advertising.

Revised Northern Hemisphere

Data for the Northern Hemisphere has been revised since the January issue of World Horticultural Trade & U.S. Export Opportunities as data for Korean tangerines was added while data for some smaller producing countries was dropped. Citrus production in the Northern Hemisphere for 1993/94 is now forecast at 41.82 million tons, 2 percent below the 1992/93 output. The most significant individual country production changes since January included increases in Spain, the United States, and Cuba and a sharp decrease in Italian output. The total Northern Hemisphere citrus export forecast for 1993/94 was revised upward based on an expected sharp increase in Spanish citrus exports.

Spain

The Spanish citrus production forecast for 1993/94 is revised upward to 5.0 million tons, 9 percent above the January forecast as weather conditions throughout the growing season turned out to be much more favorable than originally anticipated. Fruit quality and size is reportedly good, although the size of most of the lemons in the province of Murcia is below average due to lack of rains.

Citrus exports in 1993/94 are forecast at 3.0 million tons, up 21 percent from the January export forecast. The devaluation of the

Spanish Peseta has been a key factor in boosting exports. Citrus exports to non European Union countries (EU) rose by about 91,000 during the period November-April of MY 1993/94 in comparison with the same period in MY 1992/93.

Spain is the world's largest exporter of fresh citrus, marketing more than half of its total citrus production. The bulk of Spain's exports are expected to go to traditional markets such as Germany, France, the United Kingdom, Holland, and Belgium. The EU continues to provide Spain with export refunds for fresh orange and lemon shipments to non-EU countries outside North America. Processing of tangerines increased in 1993, mainly due to the reintroduction of the EU processing subsidy.

In 1993, Spanish lemon exports to Japan were authorized. Lemons exported to Japan must be treated for the Mediterranean Fruit Fly using cold treatment. The Spanish ban on imports of fresh citrus from third countries was lifted on June 1, 1993, which allow U.S. grapefruit to be imported into the Spanish market for the first time. Grapefruit consumption is becoming more popular in Spain.

United States

Citrus production estimates were adjusted up slightly from January. However, total U.S. citrus production for 1993/94 remains 4 percent below 1992/93, at 13.24 million tons. The 1993/94 U.S. orange crop is forecast at 9.5 million tons, up slightly from the January forecast but still 6 percent below last season's output. Florida's orange production is forecast at 7.1 million tons, down 8 percent from 1992/93. Groves and trees were dry during most of May until the end of the month when rainfall began. New crop fruit is making good progress in virtually all orange producing areas. Normally, Florida accounts for about 75 percent of total U.S. orange production and it is mostly for processing. The California 1993/94 orange crop is forecast at 2.2 million tons. California orange production is used primarily for fresh consumption and exports. Total U.S. grapefruit production in 1993/94 is forecast at 2.4 million tons, 5 percent below the 1992/93 output. The lemon production forecast is revised up to 900,000 tons, 7 percent above production in 1992/93.

U.S. citrus exports in 1993/94 are forecast at a record 1.18 million tons, 3 percent above the 1992/93 volume. Grapefruit and orange exports in 1993/94 are forecast at near record levels. U.S. citrus exports in 1992/93 reached 1.1 million tons, 3 percent above exports in 1991/92. About 49 percent of last season's exports were sweet oranges, 38 percent were grapefruit and 11 percent were lemons. Asia was the leading customer taking 61 percent of total U.S. citrus exports, followed by Canada with 26 percent. The value of fresh citrus exports in 1992/93 once again exceeded $600 million.

Exports of oranges in 1993/94 are forecast at 545,000 tons, down 2 percent from the January forecast. Sweet orange exports were a record 556,000 tons in 1992/93, 12 percent above the previous year's level. For 1993/94, exports are expected to fall just short of another record. During the first 6 months of the 1993/94 season, exports were down 4 percent, as increased shipments to Japan have not offset decreases to Canada and Hong Kong. Together these three markets account for almost 90 percent of U.S. orange exports. Although volume is down this year, the value of total orange exports is 7 percent above last season through April.

Exports of grapefruit in 1992/93 declined to 441,000 tons, 4 percent below the previous year. Shipments are expected to rebound to 485,000 tons in 1993/94. During the first 8 months of this season (September-April), exports are up 9 percent, with increased movement to Asia more than offsetting a decline in exports to Europe. A good Florida crop and strong demand in Japan has resulted in that country taking 54 percent of all exports thus far in 1993/94.

Lemon exports in 1992/93 were 130,000 tons, slightly below the previous season. Shipments for the first nine months of 1993/94 are running 10 percent behind 1992/93, and despite expected stronger summer demand, lemon shipments are not expected to reach last year's total. While the volume of lemon exports is down to all major

markets, the total value of these exports is up 14 percent.

U.S. citrus for processing in 1993/94 is forecast at 9.1 million tons, down 7 percent from 1992/94. A smaller Florida orange crop is the reason for the expected reduction in processing.

Mexico

Mexican citrus production is estimated to be 3.57 million tons in 1993/94, slightly up from the January forecast and 5 percent below the 1992/93 record citrus crop. The expected lower output is mainly the result of an "off-year" in Mexico's alternate citrus production cycle, combined with reduced use of inputs. The 1993/94 orange crop, which accounts for nearly 75 percent of Mexico's total citrus production, is forecast at 2.55 million tons, down 5 percent from the 1992/93 record orange crop. The quality of the first crop of oranges, which is harvested from November through April, is reported good. The second and third orange crops are expected to be of lower quality, which is normal. There are generally three orange crops for the year in Mexico.

The Secretariat of Agriculture and Water Resources is expected to implement this year a new set of regulations for marketing oranges within Mexico. One regulation will establish quality grades for oranges. Higher quality oranges will go to the fresh market and sell at a premium while inferior quality fruit will be destined for processing at lower prices. Producers still need to agree on quality standards before this new regulation can be implemented. The second regulation will establish procedures for the movement of oranges from one Mexican state to another to prevent fruit fly propagation. Under this regulation, transportation of oranges in bulk or in open trucks between states, which is the norm in Mexico, will be prohibited. Fruit must be transported in containers and be properly packed. The only fruit that will be able to be transported in bulk will be oranges designated for processing. The states of Nuevo Leon and Tamaulipas have already begun programs to eradicate fruit flies. Also, producers from these states have the necessary infrastructure, such as packing houses, to conform with the new proposed regulation. On the other hand, Veracruz, which is the largest orange producing state, does not have a fruit fly eradication program nor enough packing houses to pack their seasonal production.

Mexican citrus for processing in 1993/94 is forecast to increase due to improved international prices for frozen concentrated orange juice. Also, because of the NAFTA provisions for Mexican FCOJ entering the United States, a few companies that were almost out of business began to produce FCOJ in order to have a share of the quota, which increased processing prospects in 1993/94. Under NAFTA, the U.S. import quota on Mexican FCOJ is allocated among the companies that can prove they are active in the market (see June issue of World Horticultural Trade & U.S. Export Opportunities for more detail).

Italy

After the exceptional yield of the 1992/93 citrus crop, total Italian citrus output is expected to return to more normal production levels this season. Italy's citrus crop for 1993/94 is forecast at 3.1 million, down 6 percent from the January forecast and 8 percent below last year's crop.

Citrus exports are forecast at 192,000 tons, 2 percent above shipments in 1992/93. Demand for Italian citrus is not strong because of its relatively poor quality. However, a significant share of Italian citrus exports have been done under aid programs delivered to East European countries. Already in the 1993/94, 80,000 tons of oranges, 9,000 tons of tangerines, and 3,000 tons of lemons have been exported under these programs.

Japan

Japanese citrus production in 1993/94 is forecast at 2 million tons, 11 percent below the 1992/93 output. Increased competition from imported citrus, plus structural changes and an aging farm population, are responsible for the expected decrease. Tangerines account for almost all of Japan's citrus production. The 1993/94 tangerine crop is forecast at 1.8 million tons, 11 percent below the 1992/93 harvest

Total citrus imports are estimated to increase in 1993/94 to 513,000 tons. Orange and grapefruit imports are forecast to increase by 4 and 3 percent, respectively. Good quality crops in the United States, against a backdrop of poor quality domestic mikan tangerines is the reason for the expected increase in orange imports. The months of March and April usually provide good marketing opportunities for U.S. suppliers. In the Kansai region and west of Osaka red (ruby) grapefruit from Texas, Arizona, and California has increasingly become popular among consumer, while in Nagoya and Tokyo, white grapefruit continues to dominate the market. Given Japanese recent recession, price seems to be a first priority. Importers and traders are supplying lower price fresh oranges and grapefruit to Japanese shoppers. This situation has created concern among importers regarding their thinning revenue margins on fresh oranges and grapefruit. Although the import volume is still small, the Israeli "Sweetie" grapefruit variety has received widespread exposure in Japanese supermarkets during this season.

Cuba

Citrus production in Cuba for 1993/94 is forecast at 760,000 tons, down 2 percent from 1992/93. The forecast is based on recent reports that the situation in the Cuban citrus industry has stabilized. Over the past several years, many orchards have been abandoned, uprooted, or only minimally maintained in response to the loss of Cuba's main export markets in Eastern Europe. Now the industry's emphasis appears to be on grapefruit. Reportedly, there are at least three joint venture schemes specifically aimed at maintaining grapefruit production and improving quality. In addition, processing of both oranges and grapefruit increased in 1993/94 because of increased processing capacity.

Other Northern Hemisphere Countries

There are no other significant changes from last reported.

For further information on supply, distribution, and trade, contact Samuel Rosa, 202-720-9792. For information on production, contact Kelly Kirby at 202-720-6791.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
(1,000 METRIC TONS)
Table 1: TOTAL CITRUS

Country/Year 1/	Production	Imports	Exports	Processed	Consumption 2/
Northern Hemisphere					
Mediterranean Basin					
Cyprus					
1991/92	339	0	209	97	33
1992/93	318	0	175	100	43
1993/94 F	322	0	182	100	40
Egypt					
1991/92	2,413	0	112	13	2,288
1992/93	2,496	0	254	14	2,228
1993/94 F	2,425	0	206	16	2,203
Gaza					
1991/92	104	0	95	0	9
1992/93	104	0	95	0	9
1993/94 F	104	0	95	0	9
Greece					
1991/92	1,013	6	311	192	516
1992/93	1,068	0	405	190	473
1993/94 F	1,010	0	351	179	480
Israel					
1991/92	1,042	49	332	579	180
1992/93	900	33	258	502	173
1993/94 F	1,065	45	331	589	190
Italy					
1991/92	3,023	48	179	1,082	1,810
1992/93	3,406	55	188	927	2,346
1993/94 F	3,134	70	192	967	2,045
Morocco					
1991/92	1,087	0	508	43	536
1992/93	1,222	0	485	91	646
1993/94 F	1,347	0	511	171	665
Spain					
1991/92	4,559	0	2,466	645	1,448
1992/93	5,263	3	2,950	622	1,694
1993/94 F	4,992	6	2,971	486	1,541
Turkey					
1991/92	1,691	7	440	169	1,089
1992/93	1,670	12	246	168	1,268
1993/94 F	1,608	10	255	161	1,202
Subtotal Mediterranean Basin					
1991/92	15,271	110	4,652	2,820	7,909
1992/93	16,447	103	5,056	2,614	8,880
1993/94 F	16,007	131	5,094	2,669	8,375
Other Northern Hemisphere					
China					
1991/92	4,386	0	47	139	4,200
1992/93	5,060	0	65	156	4,839
1993/94 F	5,610	0	72	185	5,353
Cuba					
1991/92	758	0	102	176	480
1992/93	774	0	89	184	501
1993/94 F	760	0	103	300	357
Japan 3/					
1991/92	2,067	521	13	325	2,250
1992/93	2,219	500	12	401	2,306
1993/94 F	2,027	513	14	275	2,251
Korea					
1991/92	556	0	1	74	481
1992/93	719	0	1	120	598
1993/94	619	0	1	100	518
Mexico					
1991/92	3,194	3	93	338	2,766
1992/93	3,738	3	113	486	3,142
1993/94 F	3,565	3	99	402	3,067
United States					
1991/92	11,297	136	1,111	7,506	2,816
1992/93	13,839	133	1,146	9,800	3,026
1993/94 F	13,238	140	1,180	9,066	3,132
Subtotal Other Northern Hemisphere					
1991/92	22,258	660	1,367	8,558	12,993
1992/93	26,349	636	1,426	11,147	14,412
1993/94 F	25,819	656	1,469	10,328	14,678
Total Northern Hemisphere					
1991/92	37,529	770	6,019	11,378	20,902
1992/93	42,796	739	6,482	13,761	23,292
1993/94 F	41,826	787	6,563	12,997	23,053
Southern Hemisphere					
Argentina					
1991/92	1,560	3	217	630	716
1992/93	1,772	5	177	743	857
1993/94 F	1,703	2	204	706	795
Australia					
1991/92	648	8	82	421	155
1992/93	607	7	102	353	158
1993/94 F	657	8	117	375	171
Brazil					
1991/92	16,327	0	95	11,885	4,347
1992/93	15,411	0	94	10,538	4,779
1993/94 F	15,645	0	94	10,793	4,758
South Africa 4/					
1991/92	882	0	476	239	167
1992/93	821	1	423	230	169
1993/94 F	822	0	434	220	168
Total Southern Hemisphere					
1991/92	19,417	10	871	13,171	5,385
1992/93	18,611	12	797	11,863	5,963
1993/94 F	18,827	9	851	12,093	5,892
Grand Total					
1991/92	56,946	780	6,890	24,549	26,287
1992/93	61,407	751	7,279	25,624	29,255
1993/94 F	60,653	796	7,414	25,090	28,945

Horticultural & Tropical Products Division, FAS/USDA. See footnotes on page 23. Production Estimates and Crop Assessment Division, FAS/USDA.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
(1,000 METRIC TONS)
Table 2: SWEET ORANGES

Country/Year 1/	Production	Imports	Exports	Processed	Consumption 2/
Northern Hemisphere					
Mediterranean Basin					
Cyprus					
1991/92	168	0	94	54	20
1992/93	160	0	75	57	28
1993/94 F	165	0	80	60	25
Egypt					
1991/92	1,694	0	108	8	1,578
1992/93	1,771	0	250	8	1,513
1993/94 F	1,700	0	200	10	1,490
Gaza 5/					
1991/92	87	0	81	0	6
1992/93	87	0	81	0	6
1993/94 F	87	0	81	0	6
Greece					
1991/92	820	2	270	172	380
1992/93	872	0	340	170	362
1993/94 F	800	0	280	155	365
Israel					
1991/92	513	38	169	312	70
1992/93	377	25	111	205	86
1993/94 F	500	35	160	295	80
Italy					
1991/92	1,842	0	133	790	919
1992/93	2,111	3	137	600	1,377
1993/94 F	1,900	10	140	570	1,200
Morocco					
1991/92	780	0	342	43	395
1992/93	874	0	323	89	462
1993/94 F	990	0	320	150	520
Spain					
1991/92	2,651	0	1,237	342	1,072
1992/93	2,989	3	1,350	370	1,272
1993/94 F	2,670	6	1,426	225	1,025
Turkey					
1991/92	830	7	61	83	693
1992/93	820	6	40	83	703
1993/94 F	800	5	40	80	685
Subtotal Mediterranean Basin					
1991/92	9,385	47	2,495	1,804	5,133
1992/93	10,061	37	2,707	1,582	5,809
1993/94 F	9,612	56	2,727	1,545	5,396
Other Northern Hemisphere					
China					
1991/92	929	0	5	37	887
1992/93	1,070	0	6	42	1,022
1993/94 F	1,190	0	7	59	1,124
Cuba					
1991/92	428	0	17	82	329
1992/93	425	0	33	80	312
1993/94 F	400	0	45	160	195
Japan					
1991/92	37	170	0	2	205
1992/93	39	163	0	2	200
1993/94 F	35	170	0	2	203
Mexico					
1991/92	2,200	1	10	150	2,041
1992/93	2,700	1	3	300	2,398
1993/94 F	2,550	1	3	210	2,338
United States 6/					
1991/92	8,178	16	495	6,203	1,496
1992/93	10,071	10	556	7,858	1,667
1993/94 F	9,466	10	545	7,300	1,631
Subtotal Other Northern Hemisphere					
1991/92	11,772	187	527	6,474	4,958
1992/93	14,305	174	598	8,282	5,599
1993/94 F	13,641	181	600	7,731	5,491
Total Northern Hemisphere					
1991/92	21,157	234	3,022	8,278	10,091
1992/93	24,366	211	3,305	9,864	11,408
1993/94 F	23,253	237	3,327	9,276	10,887
Southern Hemisphere					
Argentina					
1991/92	640	0	73	200	367
1992/93	660	0	63	188	409
1993/94 F	630	1	63	190	378
Australia					
1991/92	612	6	81	402	135
1992/93	572	5	100	337	140
1993/94 F	622	6	115	359	154
Brazil					
1991/92	14,974	0	82	11,670	3,222
1992/93	14,117	0	82	10,322	3,713
1993/94 F	14,362	0	82	10,567	3,713
South Africa 4/ 7/					
1991/92	712	0	387	175	150
1992/93	664	1	342	170	153
1993/94 F	660	0	350	160	150
Total Southern Hemisphere					
1991/92	16,938	6	623	12,447	3,874
1992/93	16,013	6	587	11,017	4,415
1993/94 F	16,274	7	610	11,276	4,395
Grand Total					
1991/92	38,095	240	3,645	20,725	13,965
1992/93	40,379	217	3,892	20,881	15,823
1993/94 F	39,527	244	3,937	20,552	15,282

Horticultural & Tropical Products Division, FAS/USDA. See footnotes on page 23. Production Estimates and Crop Assessment Division, FAS/USDA.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
(1,000 METRIC TONS)
Table 3: TANGERINES

Country/Year 1/	Production	Imports	Exports	Processed	Consumption 2/
Northern Hemisphere					
Mediterranean Basin					
Egypt					
1991/92	298	0	0	2	296
1992/93	340	0	0	3	337
1993/94 F	300	0	0	3	297
Greece					
1991/92	73	0	11	2	60
1992/93	77	0	16	2	59
1993/94 F	75	0	13	2	60
Israel					
1991/92	127	0	29	37	61
1992/93	115	0	29	36	50
1993/94 F	130	0	35	35	60
Italy					
1991/92	428	5	13	63	357
1992/93	500	3	27	40	436
1993/94 F	480	3	30	60	393
Morocco 8/					
1991/92	280	0	166	0	114
1992/93	317	0	160	1	156
1993/94 F	325	0	190	20	115
Spain					
1991/92	1,340	0	905	202	233
1992/93	1,521	0	1,150	100	271
1993/94 F	1,610	0	1,090	150	370
Turkey					
1991/92	390	0	146	39	205
1992/93	390	0	91	39	260
1993/94 F	370	0	90	37	243
Subtotal Mediterranean Basin					
1991/92	2,936	5	1,270	345	1,326
1992/93	3,260	3	1,473	221	1,569
1993/94 F	3,290	3	1,448	307	1,538
Other Northern Hemisphere					
China					
1991/92	3,457	0	42	102	3,313
1992/93	3,990	0	59	114	3,817
1993/94 F	4,420	0	65	126	4,229
Cuba					
1991/92	11	0	0	0	11
1992/93	15	0	0	0	15
1993/94 F	15	0	0	0	15
Japan 9/					
1991/92	1,867	0	13	317	1,537
1992/93	2,019	0	12	396	1,611
1993/94 F	1,834	0	14	270	1,550
Korea					
1991/92	556	0	1	74	481
1992/93	719	0	1	120	598
1993/94 F	619	0	1	100	518
Mexico					
1991/92	165	0	12	18	135
1992/93	185	0	9	18	158
1993/94 F	170	0	10	18	142
United States 10/					
1991/92	342	19	20	117	224
1992/93	352	18	15	134	221
1993/94 F	436	18	21	165	268
Subtotal Other Northern Hemisphere					
1991/92	6,398	19	88	628	5,701
1992/93	7,280	18	96	782	6,420
1993/94 F	7,494	18	111	679	6,722
Total Northern Hemisphere					
1991/92	9,334	24	1,358	973	7,027
1992/93	10,540	21	1,569	1,003	7,989
1993/94 F	10,784	21	1,559	986	8,260
Southern Hemisphere					
Argentina					
1991/92	220	0	27	25	168
1992/93	345	0	42	33	270
1993/94 F	348	0	41	37	270
Brazil 11/					
1991/92	605	0	8	120	477
1992/93	553	0	8	120	425
1993/94 F	530	0	8	120	402
Total Southern Hemisphere					
1991/92	825	0	35	145	645
1992/93	898	0	50	153	695
1993/94 F	878	0	49	157	672
Grand Total					
1991/92	10,159	24	1,393	1,118	7,672
1992/93	11,438	21	1,619	1,156	8,684
1993/94 F	11,662	21	1,608	1,143	8,932

Horticultural & Tropical Products Division, FAS/USDA. See footnotes on page 23. Production Estimates and Crop Assessment Division, FAS/USDA.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
(1,000 METRIC TONS)
Table 4: LEMONS

Country/Year 1/	Production	Imports	Exports	Processed	Consumption 2/
Northern Hemisphere					
Mediterranean Basin					
Cyprus					
1991/92	58	0	37	10	11
1992/93	48	0	30	8	10
1993/94 F	45	0	30	5	10
Gaza					
1991/92	8	0	7	0	1
1992/93	8	0	7	0	1
1993/94 F	8	0	7	0	1
Greece					
1991/92	120	4	30	18	76
1992/93	119	0	49	18	52
1993/94 F	135	0	58	22	55
Israel					
1991/92	36	6	9	15	18
1992/93	18	1	2	2	15
1993/94 F	35	5	10	12	18
Italy					
1991/92	713	0	32	195	486
1992/93	752	10	22	250	490
1993/94 F	710	20	20	300	410
Morocco					
1991/92	20	0	0	0	20
1992/93	20	0	0	1	19
1993/94 F	20	0	0	1	19
Spain					
1991/92	555	0	324	89	142
1992/93	737	0	450	137	150
1993/94 F	700	0	455	100	145
Turkey					
1991/92	429	0	199	43	187
1992/93	420	5	90	42	293
1993/94 F	400	5	100	40	265
Subtotal Mediterranean Basin					
1991/92	1,939	10	638	370	941
1992/93	2,122	16	650	458	1,030
1993/94 F	2,053	30	680	480	923
Other Northern Hemisphere					
Japan					
1991/92	2	94	0	0	96
1992/93	2	98	0	0	100
1993/94 F	2	98	0	0	100
Mexico					
1991/92	5	1	0	5	1
1992/93	5	1	0	5	1
1993/94 F	5	1	0	5	1
United States					
1991/92	695	9	132	280	292
1992/93	844	7	130	416	305
1993/94 F	900	9	125	450	334
Subtotal Other Northern Hemisphere					
1991/92	702	104	132	285	389
1992/93	851	106	130	421	406
1993/94 F	907	108	125	455	435
Total Northern Hemisphere					
1991/92	2,641	114	770	655	1,330
1992/93	2,973	122	780	879	1,436
1993/94 F	2,960	138	805	935	1,358
Southern Hemisphere					
Argentina					
1991/92	530	0	71	350	109
1992/93	590	0	42	448	100
1993/94 F	550	0	70	410	70
Australia					
1991/92	36	1	2	15	20
1992/93	35	1	3	15	18
1993/94 F	35	1	4	15	17
Brazil 12/					
1991/92	53	0	4	49	0
1992/93	53	0	3	50	0
1993/94 F	63	0	3	60	0
South Africa 3/					
1991/92	60	0	31	20	9
1992/93	51	0	23	20	8
1993/94 F	53	0	24	20	9
Total Southern Hemisphere					
1991/92	679	2	107	438	135
1992/93	729	2	70	534	123
1993/94 F	701	2	99	506	94
Grand Total					
1991/92	3,320	116	877	1,093	1,465
1992/93	3,702	124	850	1,413	1,559
1993/94 F	3,661	140	904	1,441	1,452

Horticultural & Tropical Products Division, FAS/USDA. See footnotes on page 23. Production Estimates and Crop Assessment Division, FAS/USDA.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
(1,000 METRIC TONS)
Table 5: GRAPEFRUIT

Country/Year 1/	Production	Imports	Exports	Processed	Consumption 2/
Northern Hemisphere					
Mediterranean Basin					
Cyprus					
1991/92	113	0	78	33	2
1992/93	110	0	70	35	5
1993/94 F	112	0	72	35	5
Gaza					
1991/92	9	0	7	0	2
1992/93	9	0	7	0	2
1993/94 F	9	0	7	0	2
Israel					
1991/92	345	5	120	210	20
1992/93	383	7	111	259	20
1993/94 F	380	5	120	245	20
Italy					
1991/92	6	43	1	0	48
1992/93	6	39	2	0	43
1993/94 F	7	37	2	0	42
Turkey					
1991/92	42	0	34	4	4
1992/93	40	1	25	4	12
1993/94 F	38	0	25	4	9
Subtotal Mediterranean Basin					
1991/92	515	48	240	247	76
1992/93	548	47	215	298	82
1993/94 F	546	42	226	284	78
Other Northern Hemisphere					
Cuba					
1991/92	271	0	80	94	97
1992/93	307	0	53	104	150
1993/94 F	320	0	55	140	125
Japan					
1991/92	0	257	0	0	257
1992/93	0	239	0	0	239
1993/94 F	0	245	0	0	245
Mexico -					
1991/92	110	0	1	30	79
1992/93	118	0	1	33	84
1993/94 F	120	0	1	34	85
United States					
1991/92	2,018	11	459	885	685
1992/93	2,532	12	441	1,381	722
1993/94 F	2,396	13	485	1,140	784
Subtotal Other Northern Hemisphere					
1991/92	2,399	268	540	1,009	1,118
1992/93	2,957	251	495	1,518	1,195
1993/94 F	2,836	258	541	1,314	1,239
Total Northern Hemisphere					
1991/92	2,914	316	780	1,256	1,194
1992/93	3,505	298	710	1,816	1,277
1993/94 F	3,382	300	767	1,598	1,317
Southern Hemisphere					
Argentina					
1991/92	170	3	46	55	72
1992/93	177	5	30	74	78
1993/94 F	175	1	30	69	77
South Africa 4/					
1991/92	110	0	58	44	8
1992/93	106	0	58	40	8
1993/94 F	109	0	60	40	9
Total Southern Hemisphere					
1991/92	280	3	104	99	80
1992/93	283	5	88	114	86
1993/94 F	284	1	90	109	86
Grand Total					
1991/92	3,194	319	884	1,355	1,274
1992/93	3,788	303	798	1,930	1,363
1993/94 F	3,666	301	857	1,707	1,403

Horticultural & Tropical Products Division, FAS/USDA. See footnotes on page 23. Production Estimates and Crop Assessment Division, FAS/USDA.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
(1,000 METRIC TONS)
Table 6: OTHER CITRUS

Country/Year 1/	Production	Imports	Exports	Processed	Consumption 2/
Northern Hemisphere					
Mediterranean Basin					
Egypt 13/					
1991/92	421	0	4	3	414
1992/93	385	0	4	3	378
1993/94 F	425	0	6	3	416
Israel					
1991/92	21	0	5	5	11
1992/93	7	0	5	0	2
1993/94 F	20	0	6	2	12
Italy 14/					
1991/92	34	0	0	34	0
1992/93	37	0	0	37	0
1993/94 F	37	0	0	37	0
Morocco					
1991/92	7	0	0	0	7
1992/93	11	0	2	0	9
1993/94 F	12	0	1	0	11
Spain 15/					
1991/92	13	0	0	12	1
1992/93	16	0	0	15	1
1993/94 F	12	0	0	11	1
Subtotal Mediterranean Basin					
1991/92	496	0	9	54	433
1992/93	456	0	11	55	390
1993/94 F	506	0	13	53	440
Other Northern Hemisphere					
Cuba 13/					
1991/92	48	0	5	0	43
1992/93	27	0	3	0	24
1993/94 F	25	0	3	0	22
Japan 16/					
1991/92	161	0	0	6	155
1992/93	159	0	0	3	156
1993/94 F	156	0	0	3	153
Mexico 17/					
1991/92	714	1	70	135	510
1992/93	730	1	100	130	501
1993/94 F	720	1	85	135	501
United States 17/					
1991/92	64	81	5	21	119
1992/93	40	86	4	11	111
1993/94 F	40	90	4	11	115
Subtotal Other Northern Hemisphere					
1991/92	987	82	80	162	827
1992/93	956	87	107	144	792
1993/94 F	941	91	92	149	791
Total Northern Hemisphere					
1991/92	1,483	82	89	216	1,260
1992/93	1,412	87	118	199	1,182
1993/94 F	1,447	91	105	202	1,231
Southern Hemisphere					
Brazil 18/					
1991/92	695	0	1	46	648
1992/93	688	0	1	46	641
1993/94 F	690	0	1	46	643
Total Southern Hemisphere					
1991/92	695	0	1	46	648
1992/93	688	0	1	46	641
1993/94 F	690	0	1	46	643
Grand Total					
1991/92	2,178	82	90	262	1,908
1992/93	2,100	87	119	245	1,823
1993/94 F	2,137	91	106	248	1,874

Horticultural & Tropical Products Division, FAS/USDA. See footnotes on page 23. Production Estimates and Crop Assessment Division, FAS/USDA.

Footnotes for Citrus tables on pages 17 - 22

--Indicates zero, negligible, or not available.

1/ Crop year refers to harvest and marketing period which usually begins in the fall and extends through the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown. The harvest of lemons and limes usually begins earlier and often extends throughout the year.

2/ In Greece, Italy and Spain "consumption" includes fruit withdrawn from the market under the European Community price support program.

3/ Differs from citrus total in June 1994 issue of World Agricultural Production.

4/ Includes Swaziland plus very small quantities of citrus from Botswana, Mozambique and Zimbabwe which is marketed through the South African Citrus Board.

5/ Tangerine production is small and is included with oranges.

6/ Includes temples.

7/ Includes small quantity of tangerines.

8/ Clementines only.

9/ Mainly satsumas (also called mandarin or unshu mikan), but also including mandarin hybrids.

10/ Includes tangelos, which account for about half of combined tangerine and tangelo production. Export data include mandarins.

11/ State of Sao Paulo only, which apparently accounts for over one-half of Brazil's production. About 120,000 tons of tangerines which are processed are included in the orange table.

12/ State of Sao Paulo only.

13/ Mostly limes but some sour oranges and other varieties.

14/ Mostly bergamots.

15/ Sour oranges.

16/ Summer Oranges (Natsu mikan or natsu daidai, a hybrid of mandarin with sour orange or pomelo).

17/ Limes.

18/ Limes, state of Sao Paulo only, which apparently accounts for roughly 80 percent of Brazil's lime production.

SOURCES: National Agricultural Statistics Service and U.S. Department of Commerce, Bureau of Census for United States. Reports from U.S. Agricultural Counselors and Attaches or USDA estimates for all other countries.

U.S. EXPORTS OF FRESH ORANGES
MARKETING YEARS 1988/89-1992/93 [1/]
and Partial 1993/94 [2/]
In Metric Tons

Destination	1988/89	1989/90	1990/91	1991/92	1992/93	1993/94 [2/]
North America						
Canada	89,428	177,598	87,236	170,992	206,881	129,094
Mexico	1,449	1,362	332	81	64	51
Subtotal	**90,877**	**178,960**	**87,568**	**171,073**	**206,945**	**129,145**
The European Union (EU)						
The Netherlands	3,169	3,864	1,097	3,926	646	126
United Kingdom	655	1,191	339	702	466	373
Other	379	270	103	874	240	26
Subtotal	**4,203**	**5,325**	**1,539**	**5,502**	**1,352**	**525**
Asia						
Japan	118,765	143,879	75,392	166,214	161,786	77,523
Hong Kong	101,958	113,364	48,377	97,028	128,569	57,258
Singapore	17,349	18,861	5,298	14,435	14,936	6,599
Malaysia	10,568	8,886	4,927	11,131	11,801	6,042
Taiwan	5,153	12,163	5,429	16,600	11,675	6,803
Other	2,377	4,961	1,075	4,531	7,666	5,572
Subtotal	**256,170**	**302,114**	**140,498**	**309,939**	**336,433**	**159,797**
Oceania						
Australia	8,997	8,410	1,807	4,421	5,723	6,120
New Zealand	5,035	3,852	417	2,970	4,692	3,815
Other	296	199	237	162	151	61
Subtotal	**14,328**	**12,461**	**2,461**	**7,553**	**10,566**	**9,996**
Other Countries	1,751	744	1,197	1,148	1,052	1,511
Grand Total	**367,329**	**499,604**	**233,263**	**495,215**	**556,348**	**300,974**

1/ Marketing season begins November of first year shown.
2/ November-April
Source: U.S. Bureau of the Census

U.S. EXPORTS OF FRESH GRAPEFRUIT MARKETING YEARS 1988/89-1992/93 1/ and Partial 1993/94 2/ in Metric Tons

Destination	1988/89	1989/90	1990/91	1991/92	1992/93	1993/94 2/
North America						
Canada	27,077	38,801	77,913	68,260	69,444	59,098
Mexico	234	220	25	31	0	120
Subtotal	**27,311**	**39,021**	**77,938**	**68,291**	**69,444**	**59,218**
The European Union (EU)						
France	61,176	35,994	53,477	53,096	51,050	37,492
The Netherlands	41,095	27,013	42,123	29,395	29,021	25,286
Belgium-Luxembourg	13,518	5,309	9,896	6,561	14,567	15,318
Germany	6,291	4,064	2,991	7,014	10,833	8,287
United Kingdom	13,617	8,468	12,378	10,885	10,484	9,585
Other	4,007	1,922	1,589	1,329	910	313
Subtotal	**139,704**	**82,770**	**122,454**	**108,280**	**116,865**	**96,281**
Other Western Europe						
Switzerland	1,734	1,537	2,142	2,683	2,870	814
Sweden	1,998	831	1,209	1,137	1,202	803
Other	69	0	14	74	251	358
Subtotal	**3,801**	**2,368**	**3,365**	**3,894**	**4,323**	**1,975**
Asia						
Japan	259,109	148,514	241,796	253,666	222,775	207,396
Taiwan	32,214	9,028	11,780	16,850	18,025	11,442
Korea	11,820	3,013	4,293	4,918	4,931	5,826
Hong Kong	1,904	1,240	2,128	1,946	2,330	1,758
Other	515	183	364	637	1,078	558
Subtotal	**305,562**	**161,978**	**260,361**	**278,017**	**249,139**	**226,980**
Other Countries	1,502	1,193	756	699	1,232	1,558
Grand Total	**477,880**	**287,330**	**464,874**	**459,181**	**441,003**	**386,012**

1/ Marketing season begins September of first year shown.
2/ September to April
Source: U.S. Bureau of the Census

RAISIN SITUATION IN SELECTED COUNTRIES

U.S. raisin exports in 1993/94 are forecast at 136,000 metric tons - - 8 percent above the previous season's volume. U.S. export prospects have improved due to reduced raisin and sultana supplies in the Southern Hemisphere. Supplies are down due to smaller stock carry-ins in Australia and South Africa. Australian and South African raisin exports in 1993/94 are thus forecast to decrease by 47 and 19 percent respectively. A large crop in Turkey will also allow that country to benefit from supply shortages in other exporting countries such as Iran.

The 1993/94 raisin and sultana pack from the world's leading commercial producing countries is forecast at 632,593 metric tons (packed weight basis), up 1 percent from the previous season's harvest. Larger crops in Turkey, Chile, Australia and South Africa are expected to offset smaller crops in the United States, Greece, and Mexico. The 1993/94 year includes Northern Hemisphere crops harvested late in 1993 along with Southern Hemisphere crops harvested early in calendar 1994.

Raisin exports in 1993/94 in selected countries are forecast at 387,965 metric tons, 5 percent above the previous season's shipments. Export increases in Turkey, United States, and Chile are expected to more than offset likely decreases in Australia, South Africa, and Mexico. Turkey is expected to register the sharpest increase in exports due to possible supply shortages in major competing countries such as Iran and Afghanistan.

Northern Hemisphere Situation

United States

In the United States, raisin production in 1993/94 is forecast at 305,838 tons, down 8 percent from the previous year. This is mainly due to a smaller-than-expected grape crop. U.S. raisin exports, on the other hand, are forecast at 136,000 tons, 8 percent above the previous season's volume. U.S. export prospects have improved due to reduced raisin supplies in major Southern Hemisphere exporting countries.

U.S. exports last season declined for the second consecutive year, a trend that has been reversed during the first 10 months of 1993/94, with shipments reported by the Raisin Administrative Committee of 93,636 tons, up 12 percent from the same period in 1992/93. The increases show up in every major market except Latin America.

With supplies shorter in some competing countries, prices for the California product rose with the increase in demand. The unit value of exports has risen 14 percent to about $1,575 per metric ton, FOB. The industry reports exports during March and April were very strong to Asia, Germany, and the United Kingdom as a result of importers replenishing supplies sold during a major promotional effort.

The California Raisin Advisory Board, the industry organization providing most of the promotional support to help increase U.S. raisin sales, has been terminated. However, its international market development efforts are likely to continue through other industry venues.

Turkey

Production in 1993/94 is estimated at 175,000 tons, 12,000 tons above the previous forecast. Turkey's export forecast has also been increased from 130,000 to 140,000 tons. Supply shortages for Iranian sultanas, an important competitor, have significantly raised prospects for Turkish exporters.

Export sales through April are running well ahead of last year. Reports by the Exporters Union indicate that about 91,000 tons have been booked for export during the first seven months of marketing year (MY) 1993/94, nearly 50 percent higher than the 61,000 tons booked during the same period last year. Prices in early 1994 averaged about $1,032 per ton, just above the European Union's Minimum Import Price (882.28 ECU, almost $1,000). The European Union continues to be the major market for Turkish raisins.

Southern Hemisphere Situation and Outlook

The 1994 (corresponds to 1993/94 in the statistical tables) raisin/sultana pack is forecast at 104,755 tons, 14 percent above the previous season's output. All three major Southern Hemisphere exporters are estimated to have registered production increases. However, although Australia's production is up slightly, it is still 55 percent below the 1992 output. The transfer of multipurpose grapes from drying to wine production has contributed to the lower output in Australia.

Southern Hemisphere exports in 1994 are forecast at 72,965 tons, 23 percent below the previous season's shipments. Exports are forecast to decrease sharply in Australia and South Africa. Heavy reductions in stocks during 1992/93 will reduce exportable supplies in both countries in 1993/94 despite anticipated production increases.

South Africa

South Africa's 1994 crop is estimated at 32,480 tons, up 20 percent from last year. This year's expected recovery in production, along with generally higher quality, should keep prices strong. Most of the crop is exported, with about one quarter of the crop consumed domestically.

South Africa's raisin exports in 1993/94 are forecast at 23,965 tons, 19 percent below the previous season's volume. Although production is up, exportable supplies are down due to a smaller stock carry-in. Stocks were reduced in 1993 due to larger than expected export sales. As a processed food product, raisins qualify for a 10 percent export incentive under South Africa's General Export Incentive Scheme. However, this scheme is expected to be phased out from the end of April 1995 under the new GATT agreement.

SOUTH AFRICAN DRIED VINE FRUIT PRODUCTION BY TYPE (QUANTITY IN METRIC TONS)

TYPE	1990	1991	1992	1993	1994
Unbleached sultanas	8,314	6,678	11,806	8,025	6,070
Thompson seedless	21,105	20,097	22,438	13,712	21,360
Golden sultanas	4,201	3,353	5,317	5,115	4,930
Raisins	484	506	492	171	120
TOTAL:	34,104	30,634	40,053	27,023	32,480

Chile

Chile's raisin production in 1994 is forecast at 28,000 tons, 27 percent above the previous season's output. Increased grape output and less intense demand for grapes from the wine industry are the reasons for the expected higher output.

Production of raisins will likely continue to increase for the next few years, principally because table grape production is continuing to grow, and expanded wine grape plantings will tend to mean greater availability of table grapes for raisins in the coming years.

Over 80 percent of Chilean raisin production is for export. Exports in 1993 were 19,456 tons, somewhat larger than previously estimated because raisin production was also higher than expected. In 1994, exports are expected to increase again due to likely higher raisin output.

Chilean raisin exporters have diversified their export market in the last few years. Latin America is Chile's major market for raisins. However, Chile's steadily improving export quality means improved export prospects to the more industrialized markets that can pay higher prices. In this regard, the European Union is also becoming a more important market.

CHILEAN RAISIN EXPORTS, 1990 - 1992
(METRIC TONS)

Country	1991	1992	1993
Brazil	4,871	3,129	4,735
Peru	2,383	2,265	3,137
Colombia	2,093	2,745	2,601
United States	6,232	1,282	1,583
Germany	2,950	767	1,329
Netherlands	1,554	1,261	1,321
Others	9,359	4,610	4,750
Total	29,442	16,059	19,456

Australia

Australian raisin production in 1994 is forecast at 44,275 tons, slightly above the previous season's output but sharply below the level of two years ago. Disease problems, especially downy mildew and the transfer of multipurpose grapes from drying to wine production are the reasons for a crop significantly below average. The Australian dried fruit industry states that it needs 70,000 tons to satisfy all export and domestic demand. Thus with reduced stock levels, Australian exports are forecast down sharply in 1993/94. Australia's major export markets are Germany, Canada, the United Kingdom and New Zealand.

Promotion of Australian dried vine fruit (DVF) has been in the form of advertising the Australian export logo quality seal, and cooperative and in-store advertising where the Australian Dried Fruit Board (ADFB) provides funds for display materials such as posters, shelf barkers etc. The ADFB also promotes Australian DVF in major magazines and uses the export logo on retail sultana packets and

baked goods wrappers. Trade shows and displays are used as a vehicle to help promote Australian dried fruit. The major expenditure was in Germany, Canada, United Kingdom and New Zealand. These markets account for about 85 percent of total Australian exports.

During 1992/93 the ADFB sent the director of ADFB Food Advisory service to Canada to participate in five television programs where Australian dried fruit recipes were featured. The ADFB has brought important overseas buyers and agents to Australia with an emphasis on training and public relations in regard to the DVF industry. These visits involve meetings with representatives of the ADFB, sales agents, and visits to major producing areas.

In the domestic market, the Australian dried fruits industry has used similar practices to other horticultural industries that are competing with increasing amounts of cheap imported product. They have promoted the quality difference between the Australian and the imported product and attempted to capture nationalistic consumer sentiment, i.e. "buy Australian before imported".

Australia's raisin imports in 1993/94 are forecast at 4,016 tons, about the same as the previous year. Imports had fallen in the previous two years by 33 and 30 percent respectively. The fall in raisin imports over the last three years appears to have resulted from new pricing arrangements offered by the Australian industry, including a volume buy promotion rebate, and the increased availability of manufacturing grade raisins. Turkey was the major supplier of raisins to Australia in 1993/94, accounting for 57 percent of total imports. Other major suppliers were Iran and Greece.

For further information on supply, distribution, and trade, contact Mark Thompson, 202-720-6877. For information on production, contact Kelly Kirby at 202-720-6791.

RAISINS: PRODUCTION, SUPPLY, AND DISTRIBUTION
SELECTED COUNTRIES 1991/92 TO 1993/94 1/
(METRIC TONS, PACKED WEIGHT)

	Beginning Stocks	Production	Imports	TOTAL SUPPLY	Exports	Domestic Consumption 2/	Ending Stocks	TOTAL DISTRIBUTION
NORTHERN HEMISPHERE								
Greece								
1991/92	5,680	38,000	250	43,930	25,000	6,500	12,430	43,930
1992/93	12,430	38,000	60	50,490	35,000	7,810	7,680	50,490
1993/94	7,680	37,000	50	44,730	35,000	7,200	2,530	44,730
Mexico								
1991/92	700	9,000	2,000	11,700	4,200	7,500	0	11,700
1992/93	0	13,000	1,000	14,000	5,000	9,000	0	14,000
1993/94	0	10,000	4,000	14,000	4,000	10,000	0	14,000
Turkey								
1991/92	9,785	150,000	623	160,408	131,016	21,000	8,392	160,408
1992/93	8,392	150,000	77	158,469	110,461	35,000	13,008	158,469
1993/94	13,008	175,000	0	188,008	140,000	30,000	18,008	188,008
United States 3/								
1991/92	183,581	297,393	8,225	489,199	126,675	204,697	157,827	489,199
1992/93	157,827	333,146	6,717	497,690	125,798	203,768	168,124	497,690
1993/94	168,124	305,838	6,000	479,962	136,000	204,000	139,962	479,962
NORTHERN HEMISPHERE SUBTOTAL								
1991/92	199,746	494,393	11,098	705,237	286,891	239,697	178,649	705,237
1992/93	178,649	534,146	7,854	720,649	276,259	255,578	188,812	720,649
1993/94	188,812	527,838	10,050	726,700	315,000	251,200	160,500	726,700
SOUTHERN HEMISPHERE								
Australia 4/								
1991/92	14,667	95,807	6,064	116,538	46,574	27,839	42,125	116,538
1992/93	42,125	42,634	4,059	88,818	45,386	32,568	10,864	88,818
1993/94	10,864	44,275	4,016	59,155	24,000	30,180	4,975	59,155
Chile								
1991/92	189	19,500	0	19,689	16,059	3,000	630	19,689
1992/93	630	22,000	0	22,630	19,455	3,000	175	22,630
1993/94	175	28,000	0	28,175	25,000	3,100	75	28,175
South Africa, Republic of								
1991/92	11,898	40,053	0	51,951	23,589	9,000	19,362	51,951
1992/93	19,362	27,023	0	46,385	29,714	10,186	6,485	46,385
1993/94	6,485	32,480	0	38,965	23,965	9,000	6,000	38,965
SOUTHERN HEMISPHERE SUBTOTAL								
1991/92	27,850	162,760	6,064	196,674	90,622	42,739	63,313	196,674
1992/93	62,117	91,657	4,059	157,833	94,555	45,754	17,524	157,833
1993/94	17,524	104,755	4,016	126,295	72,965	42,280	11,050	126,295
Total								
1991/92	227,596	657,153	17,162	901,911	377,513	282,436	241,962	901,911
1992/93	240,766	625,803	11,913	878,482	370,814	301,332	206,336	878,482
1993/94	206,336	632,593	14,066	852,995	387,965	293,480	171,550	852,995

1/ 1993/94 figures are forecast. Northern hemisphere marketing years begin in August, except September in Turkey. Marketing years for Southern Hemisphere raisins, (which are harvested early in the second of the split years shown) begin Jan. 1, except December 1 in South Africa and March 1 in Australia. 2/ Domestic consumption figures include raisins used for feed and distillation purposes. 3/ Includes currants. U.S. production data have been converted to a packed weight basis in order to align them with the other supply and distribution statistics. U.S. import and export data are from U.S. Department of Commerce, Bureau of Census. 4/ Includes sultanas and lexia raisins (mostly muscats).

PROCESSED TOMATO PRODUCTS SITUATION AND OUTLOOK

U.S. exports of tomato products continue to rise despite excess world supplies. In 1993, the United States exported $171 million worth of tomato products, up 13 percent from 1992, and 235 percent from 1989. U.S. exports of tomato products, January to April, 1994 totaled $57 million, 10 percent above the same period a year ago. Somewhat higher international prices for tomato products provided the incentive for processors to expand their production in 1994.

SUMMARY

The production of tomatoes for processing in 1994 for 11 major countries is forecast at 20 million metric tons, up 12 percent from 1993. Production increases were registered in all countries except Italy and Greece. However, most of the increase at the aggregate level is attributed to the larger production forecast for the United States. Significant production increases are also expected in Brazil, Portugal, Spain, and Turkey.

Preliminary information on plantings indicate 1994 output in the Mediterranean countries will total 8.2 million tons, an increase of 11 percent from the previous year's level. Most world processors of tomato paste continue to maintain large carryover stocks, while processors of canned tomatoes are expected to reduce their stocks by 16 percent in 1994/95 from the previous season.

Processing Tomato Production In Selected Countries
(1,000 Metric Tons)

	1990	1991	1992	1993	1994
North America					
United States	9,394	9,864	7,963	8,778	9,791 1/
Mexico	365	420	52	350	370
Total	9,759	10,284	8,015	9,128	10,161
South America					
Brazil	na	760	707	670	930
Chile	na	na	515	611	711
Total	na	760	1,222	1,281	1,641
Western Mediterranean					
Italy	3,800	3,400	3,200	3,500	3,400
Greece	1,090 2/	1,177 3/	966 3/	1,056 4/	1,050
Spain	1,140	872	768	893	1,000
Portugal	823	706	447	501	755
France	326	320	249	238	300
Total	7,179	6,475	5,630	6,188	6,505
Eastern Mediterranean					
Turkey	1,450	1,320	1,500	1,050	1,500
Israel	370	168	161	203	230
Total	1,820	1,488	1,661	1,253	1,730

Processing Tomato Production in Selected Countries (cont'd.)
(1,000 Metric Tons)

	1990	1991	1992	1993	1994
Total Mediterranean	8,999	7,963	7,291	7,441	8,235
Grand Total	18,758	19,007	16,528	17,850	20,037

1/ Contract only. In 1993, total production was one percent larger than production under contract.
2/ Includes 81,000 tons diverted to the fresh market and 119,000 tons withdrawn from the market.
3/ Includes approximately 50,000 tons diverted to the fresh market.
4/ Includes approximately 30,000 tons withdrawn from the market or diverted to the fresh market.
Source: Production Estimates and Crop Assessment Division, FAS, USDA.

United States

Production of tomatoes for processing in the United States in 1994 is forecast at 9.8 million metric tons, up 13 percent from 1993 contract production, and 12 percent above total 1993 production. Area under contract is estimated at 139,000 hectares, up 9 percent from the 1993 contract level. Somewhat higher prices for tomato products provided the incentive for processors to increase contracting.

The major U.S. processors of tomatoes are located in the state of California. Because of the closing of two processing plants in the Midwest, production is expected to be further concentrated in California this season. California is expected to account for 94 percent of the production this year, compared with 93 percent in 1993. The United States is world's largest producer of processed tomato products, with tomato concentrates (especially paste, sauces, and catsup) accounting for the majority of the products produced.

In marketing year (July-June) 1992/93, U.S. exports of tomato products totaled 180,000 tons valued at $153 million, up 20 percent in volume and 15 percent in value. Canada remained the chief U.S. customer, accounting for 62 percent of the total value. Other important export markets for tomato products included Japan and other Asian countries, accounting for 20 percent of the total value, followed by Mexico, the EU, the Caribbean, Central America, other Western Europe, and Australia.

Through April of the July 1993/June 1994 marketing year, U.S. exports of tomato products have totaled 169,000 tons valued at $150 million, up 13 percent in value from the same period the previous season. Exports to Canada, the United States biggest customer, increased $2.3 million during this period. Other markets registering significant increases in value included: Japan ($7.1 million); Australia ($5.4 million); United Kingdom ($3.0 million); Korea, Rep. ($1.5 million); Colombia ($ 0.9 million); Mexico ($0.7 million); and Russian Federation ($0.6 million).

Mexico

Mexico's production of tomatoes for processing in 1994 is forecast at 370,000 tons, up 6 percent from the 350,000 tons produced in 1993. Improved international prices for tomato products and increased area are the primary reasons for higher production.

The bulk of Mexico's processed production is devoted to tomato paste. Tomato paste production in 1994 is forecast at 55,000 tons, up 5 percent from 1993.

There are eight tomato paste processing plants in Mexico. The majority of these plants are located in the state of Sinaloa, and operate from March to June. The existing tomato processing capacity for paste in Sinaloa is about 6,350 tons per day. Most of the tomatoes for processing are contracted by the processors directly with local growers. Growers under contract with processing plants are provided with seedlings, fertilizer, and the technology for pest control. Processors deduct the costs for these inputs at the time of payment for the product.

Mexico's tomato paste exports in 1994 are expected to account for nearly 90 percent of total production. The United States is the primary market for Mexican tomato paste. Reportedly, producers are looking for other potential export markets for their tomato paste.

European Union

The 1994 harvest of processing tomatoes in the major producing countries of the European Union (EU) is forecast at 6.5 million tons, up 5 percent from 1993. As of late June, the 1994 EU system of support for processing tomatoes has not been finalized. The final package is expected to maintain the EU-wide quota of 6.6 million tons but to reduce support prices in ECU terms.

Greece

The 1994 tomato crop in Greece (both for processing and fresh table use) is forecast to reach 1,810,000 tons, down 2 percent from 1993. Tomatoes for processing are expected to total 1.1 million tons. An early-season assessment of the area harvested this year for tomatoes for processing is estimated at 19,700 hectares, down 6 percent from the 1993 level. In previous years, the Greek government encouraged area expansion to ensure that Greece completely filled its EU quota. However, with expected reduced EU support, many analysts expect that area devoted to processing tomatoes will trend downward during the next several years.

Of the total 1993 industrial tomato production, 1.1 million tons, about 10,000 tons were diverted to the fresh market, and 20,000 tons for home use and/or waste at the farm level. According to the Ministry of Agriculture, actual deliveries to processing plants totaled 1,026,000 tons, of which 1,000,000 tons were delivered for tomato paste processing.

About 60 percent of 1993's tomato paste production was aseptically packed, mostly in drums of 215 to 220 kilograms net weight at 36 to 38 degree brix, while another 20 percent of the paste production was packed in plain drums with the same concentration, with salt added.

A total of 38 tomato paste processing plants operated in 1993 compared with 40 plants operating in 1992. Five of these plants processed over 50,000 tons of raw material each, 21 processed between 10,000 to 50,000 tons each, and the remaining 12 plants processed below 10,000 tons each. The total number of plants processing tomato products in 1992 and 1991 were 44 and 51, respectively. The gradual reduction of the number of plants processing tomato products in recent years is attributed to the overall financial problems faced by the tomato processing industry in Greece.

Out of the 1,000,000 tons of tomatoes delivered to processors in 1993, 3 percent was used for tomato products other than paste, such as whole peeled canned tomatoes, crushed, chopped, diced, and flakes. The amount of canned whole peeled, crushed, and chopped tomatoes used in 1993 was 11,000 tons, about the same level utilized the year before.

The production of tomato paste in Greece in 1994 is forecast to reach 179,500 tons, up 2 percent from 1993. Tomato paste exports, which account for nearly 90 percent of total paste production in most years, were down approximately 2 percent in 1993. Italy continues as a leading importer of Greek tomato paste.

France

Production of tomatoes for processing in France in 1994 is estimated at 300,000 tons, up 26 percent from 1993. This rise in production is due mainly to an increase in planted area and higher yields. In 1993, yields of tomatoes for processing were down 12 percent to 39 tons per hectare compared with 1992. In 1994, yields are expected to increase to about 46 tons per hectare, but will not be as high as yields in 1991 of 50 tons per hectare. Tomatoes for processing are grown entirely in open fields, while tomatoes for the fresh market are grown in open fields as well as in greenhouses.

France is not expected to fulfill its 1994 EU production quota of 392,406 tons for processed tomatoes, due to the continuing difficulties that the French producers are experiencing in trying to compete with low-priced imports. The French processed tomato quota is broken down as follows: 278,691 tons for tomato paste; 73,628 tons for whole peeled tomatoes; and 40,087 tons for other production.

French production of canned tomatoes and tomato paste in 1994 is forecast at 46,000 tons and

40,000 tons, respectively.

In 1993, France's consumption of canned tomatoes and tomato paste remained relatively stable at 120,000 tons and 73,400 tons, respectively. Similar trends are forecast in 1994.

The EU minimum grower price (MAP) for French fresh tomatoes intended for the manufacture of canned whole peeled tomatoes in 1993 was U.S. $14.92 per 100 kilograms, and U.S. $11.70 per 100 kilograms for the manufacture of canned tomato paste. Both Map were down 6 percent in dollar terms from the previous year.

The EU processing subsidies per 100 kilograms of product (net weight) in 1993 amounted to U.S. $9.88 for canned whole peeled tomatoes, and U.S. $38.98 for tomato paste. Both subsidies were down 5 percent from the previous year.

France continues to be a net importer of fresh and processed tomatoes in 1993. Morocco was France's primary supplier of fresh tomatoes, accounting for 43 percent of total imports. Imports of canned tomatoes in 1993 of 80,653 tons were down 5 percent from the previous year, while imports of tomato paste totaling 37,265 tons were down 11 percent. Italy and Spain remain France's primary suppliers of canned tomatoes; while Portugal, Italy, Spain and Greece were the major suppliers of tomato paste. In 1993, France's exports of tomato paste totaled 3,400 tons, with about 67 percent going to EU countries.

Spain

Production of tomatoes for processing in Spain in 1994 is estimated at 1,000,000 tons, up 3 percent from 1993. This increase is due mainly to an increase in planted area. Although much of Spain suffered from severe drought in early 1994, recent rains have raised the level of most reservoirs which will ensure an adequate supply of irrigation water. In regions with drought-induced water deficits, farmers will allocate water to tomatoes instead of other crops since tomatoes are by far a more profitable crop, particularly tomatoes for canning. The bulk of tomatoes produced in Spain is irrigated.

In Spain, tomatoes are grown in the east from Catalonia to Almeria, Estremadura, the Canary Islands and the Ebro River basin--Navarra, Rioja and Aragon. The tomato crop for paste processing is grown primarily in Estremadura, while that for peeled processing is grown in the Ebro River Valley, Navarra, La Rioja and Aragon, Toledo and Murica. Spain harvests about 59 percent of its crop from June to September, about 21 percent from October to December, and about 20 percent from January to May. A large number of tomato plants in Estremadura had to be replaced as a result of freezing temperatures in early May.

Beginning in marketing year 1992/93, Spanish tomato production was included in the global EU production quota for tomatoes. Minimum grower prices and production aids were fully aligned with the rest of the EU for the 1992/93 marketing year. The EU Council Regulation 668/93 of March 17, 1993 establishes an annual production quota for six EU countries over the next two marketing years, 1993/94 and 1994/95. The production quota for Spain will be limited to the following quantities fresh tomato equivalent: tomato paste (concentrate), 550,000 tons; whole peeled tomatoes, 240,000 tons; and other tomato products, 177,050 tons.

In 1994, canned tomato production is estimated at 250,000 tons, about the same level as the previous year. During the year, domestic consumption accounted for about 70 percent and exports 26 percent of total canned utilization.

There are about 125 plants for processing tomatoes for canning including peeled, whole or in pieces, crushed, etc. with a total raw tomato processing capacity of about 500,000 tons. Average utilized capacity runs between 40 and 50 percent. Production capacity for canned tomatoes does not change significantly from one year to the next.

Canneries engaged in peeled tomato processing are primarily located in the Ebro basin (Navarra) and Murica, and account for a majority of total production. Plants engaged in crushed tomato processing are mainly based in Badajoz.

Under the category of canned tomatoes in Spanish statistics, whole, non-whole peeled and crushed tomatoes are reported. Tomato juice, passatos or "tomato pizza", tomato puree and flakes are reported under the EU "other tomato products" quota, and are not included in this category.

Tomato paste production in 1994 is estimated at 116,000 tons, up 4 percent from 1993. Estremadura, in the southwestern region of the

country, is the major tomato paste producing area in Spain, accounting for almost 90 percent of the country's total output. The remaining 10 percent is produced in scattered locations throughout peninsular Spain and in the Canary Islands. About 80 percent of tomato paste production in Spain is 28/30 percent TSS and 20 percent is triple concentrated level of 36/38 percent TSS.

As in the case of fresh tomatoes, most of Spain's canned tomatoes and tomato paste products are exported to EU countries. In calendar year 1993, canned tomato exports totaled 47,000 tons, 36 percent above the previous year. Exports to non-EU countries included Canada, Argentina, Australia, and Angola. Exports of tomato paste during the same period totaled 67,000 tons, about 2 percent above the previous year. Other non-EU countries customers that bought tomato paste in 1993 were Brazil, Argentina, Dominican Republic, Japan, Sweden, etc.

Portugal

Production of tomatoes for processing in Portugal in 1994 is forecast at 755,000 tons, up 51 percent from 1993. Low stocks, high export prices, and increased demand are slated as the main reasons for the rise in production.

The bulk of Portugal's tomato processing consists of tomato paste production. Production of other tomato products consists mostly of diced tomatoes (peeled or unpeeled), and crushed tomatoes.

In 1994, tomato paste production is forecast to reach 146,000 tons, up 52 percent from 1993. Favorable prices in the export markets are cited as the primary reason for the increase. Also, diced tomato production accounting for roughly 10,000 tons of the processed tomato output in 1994 will be up due to a new production line. Reportedly, Portuguese diced tomato production will continue to expand under the EU set sub-quota for "other" processed tomato products. Canned tomato production, presently small in comparison to tomato paste production, will decline due to the non-competitiveness of the national industry.

Tomatoes for processing are grown in the "Ribatejo" and in the "Alentejo". Tomato production continues to be dominated by small farmers on land areas ranging from 5 to 10 hectares each, which account for about 90 percent of total production. They continue to be mostly tenants renting the land on an annual basis. The structure of the industry is beginning to change, and an estimate of about 10 percent of the total tomato areas have been established on larger-scaled farms with new direct seeding technology. The number of larger scale farms should increase in the future because the need to cut costs and the preference of the processors to establish contracts.

Out of the eight tomato processors which closed in 1993, only two will re-open in 1994; SERRANOS in the Ribatejo, which was bought by Spanish investors, and TOMSIL in the Alentejo, which has been sold by a bank to private owners. Thus, a total of 16 tomato processing factories will operate in 1994 with an estimated production capacity of 700,000 tons to 750,000 tons per year, substantially below the national quota of 840,000 tons set by the EU.

Virtually all of Portugal's tomato paste production is slated for the export market. Despite the industry's efforts to diversify its export markets, the bulk of tomato paste exports has been directed to EU markets. Sales to the United States remain minimal.

Israel

Production of tomatoes for processing in Israel in 1994 is forecast at 230,000 tons, up 13 percent from 1993. With three consecutive small crops since 1991, processors were able to clear most of their stocks, enabling them to offer larger contracts for 1994. In an earlier forecast, processors and trade sources believed that deliveries to the processors for 1994 would reach 290,000 tons, but because of religious holidays falling in September of this year, a principal harvesting month, most sources now expect that actual deliveries will not exceed 230,000 tons. The principal harvesting months of tomatoes in Israel are June, July, August, and September.

The planted area for processed tomatoes in 1994 is estimated at 2,900 hectares, compared with 2,100 hectares in 1993. The major planted areas are Jezreel Valley, 35 percent; Golan Heights, 25 percent; and Western Galilee, 15 percent.

The 1994 harvest will be processed by ten plants rather than the eleven that operated in 1992 and fourteen in 1990. Some were closed and others merged. The main products of the processing plants are whole and diced peeled tomatoes,

tomato paste, puree, juice, ketchup and pizza sauces. Most of the tomato processing plants produce the whole range of tomato products, while other specialize in one or two products.

Production of tomato paste in 1994 is forecast at 16,400 tons, about the same as the level produced in 1993. Exports and domestic consumption account for 40 percent and 60 percent of the total Israeli tomato paste supply.

The farm gate price paid for industrial tomatoes fell from U.S. $68.00 per ton in 1991 to U.S. $66.50 per ton in 1994. Approximately 15 percent of the tomatoes growers obtain yields of 110 to 120 metric tons per hectare, with some reportedly reaching 140 tons per hectare. According to a survey report, the break even point for tomato growers in Israel in 1991 was 88 tons per hectare and presently 96 tons per hectare.

Chile

Chile's production of tomatoes for processing in 1994 is estimated at 711,000 metric tons, up 16 percent from 1992. The rise in production is due to several factors, an increase in planted area, good yields, and favorable international prices.

Because of the above factors, Chile's tomato paste production for 1994 is estimated at 95,000 tons, up 24 percent from 1993. Chile has significantly expanded planted area, production and exports of processed tomato products in recent years. Over 50 percent of the tomato planted area in Chile is now utilized for processing tomatoes. Tomato paste accounts for over 55 percent of the total processing volume. There is no breakout of other processed tomato products.

Tomatoes grown for processing in Chile are mainly planted based on advance contracts between the industry and the individual growers. Tomatoes for the industry are planted from mid-September through early December of each year and harvested from around January 10 through April 15.

Processed tomatoes in Chile consist primarily of canned whole peeled, crushed peeled and diced, and tomato paste. Canned tomato products and tomato paste are produced mainly for the export market.

In 1993, Chile exported slightly over 64,000 tons of tomato paste. Brazil accounted for the lion's share of these exports with 39 percent, followed by Japan with 20 percent, Argentina with 15 percent, and the United States with 8 percent.

Turkey

The production of tomatoes for processing in 1994 is forecast at 1.5 million tons, up 43 percent from the unusually small harvest in 1993. Last year, growers sharply cut back production of processing tomatoes because of attractive fresh market prices and the already large buildup of tomato paste stocks in international markets. The upturn in production for 1994 reflects the fact that grower and processor prices are expected to be significantly higher this season due to stronger international prices for tomato paste and the rapid devaluation of the Turkish lira.

It is generally believed that about one-fourth of total Turkish tomato production is industrial tomatoes. Home production in the past equaled almost one-half of total tomato paste production; but by 1993 only an estimated 22,000 tons of home paste was produced.

Tomato paste production in 1994 is estimated at 220,000 tons, up 47 percent from 1993. Attractive international prices are the primary reason for this increase.

Turkey has an annual tomato paste production capacity of 370,000 tons, the second largest in Europe after Italy with 400,000 tons capacity. Large tomato paste stocks in international markets and strong competition prevented higher utilization of local processing facilities in 1994.

Consumption in Turkey consists mostly of fresh tomatoes. However, consumption of commercially produced tomato paste is increasing annually due to urbanization. It is estimated that local consumption of commercially produced tomato paste in 1994 will total 82,000 tons.

In 1993, Turkey exported 117,000 tons of tomato paste, with Japan taking the lion's share of nearly 32,000 tons, followed by the United Kingdom, Libya, Saudi Arabia, Switzerland, and Austria with volumes ranging from 5,000 tons to 8,000 tons. Tomato paste exports in 1994 are projected at 140,000 tons. Turkey's major tomato paste competitors in international markets are Portugal and the United States. Recently, Chile and Thailand are said to have become competitors as

well.

Brazil

Production of tomatoes for processing in Brazil (included in this report for the first time) in 1994 is forecast at 930,000 tons, up 39 percent from 1993 and 31 percent from 1992. In 1994, the area planted to processing tomatoes totaled 21,425 hectares, up 33 percent from the previous season.

Tomatoes are produced in all states of Brazil. The principal regions where tomatoes for processing are grown are Sao Paulo, the Sao Francisco River Valley in the Northeast, and the Cerrado regions of Goias and Minas Gerais States. The central and southern regions harvest tomatoes from June through November, while the northern region harvest tomatoes from May through October.

Yields for processing tomatoes in Sao Paulo, the largest producing state, are in the 40 to 45 ton per hectare range. A substantial number of processing tomato growers in the States of Sao Paulo, Goias, and Minas Gerais irrigate their crop. All production in the northeast states of Bahia and Pernambuco is irrigated. The estimated cost to irrigate one hectare is US $1,500. In 1993, several farmers in Goais lost money producing tomatoes for processing because of the high costs of irrigation equipment.

The principal factor affecting the planted area of processing tomatoes in Brazil is price. Processing tomato production is carried out under contract between growers and processors. A few weeks prior to the beginning of the planting season, processors contract with growers for the quantity required and negotiate prices to be paid upon delivery. Contract prices are adjusted monthly according to the rate of inflation.

In Brazil, tomato processors extend technical assistance, credit, as well as certified seeds to growers of tomatoes for processing. Reportedly, this is not the case for growers of tomatoes for fresh consumption, where there is no form of support.

Brazil's annual production of tomato products includes tomato puree (17 to 18 percent TSS) accounting for about 50 percent of total processed production; tomato paste (26 percent TSS), accounting for about 30 percent of processed production; and tomato sauce, catsup, and juice accounting for the balance of production. Production of canned whole peeled, stewed, and diced tomatoes is small and produced mostly for the export market.

Tomato products in Brazil are packed in cans (140 grams, 270 grams, 370 grams, 520 grams, 1,000 grams, and 5,000 grams each), in glass containers (270 grams, 370 grams, and 1,000 grams each), in cartons (370 grams, 520 grams, and 1,000 grams each), and in plastic containers of 400 grams each.

According to processors, product yields average as follows: 4.5 kilograms of fresh tomatoes are used to produce one kilogram of tomato paste; 2.5 kilograms are used to produce 1 kilogram of puree, and 2.5 to 2.7 kilograms of product is used to produce 1 kilogram of tomato sauce.

Brazil's exports of tomato products during calendar year 1993, 46,000 tons valued at US $34 million, were up 37 percent in volume from the year before. Brazil's major markets for tomato products in 1993 were Argentina, Paraguay, Canada, and Uruguay. Brazil's imports of tomato products during calendar years 1993 and 1992 totaled 45,000 tons valued at US $42 million, and 38,000 tons valued at US $41 million, respectively. Traditionally, tomato paste accounts for the bulk of Brazil's tomato product imports with Chile, China, and Spain being the major suppliers.

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Canned Tomatoes 1/: Production, Supply, and Distribution in Selected Countries

Metric Tons Net Weight; Including whole peeled, and/or wedged, diced, crushed, and other non-concentrated products; Preliminary 1993/94, Forecast 1994/95

Marketing Year 2/	Beginning Stock	Production	Imports	Supply/ Distribution	Exports	Domestic Consumption	Ending Stock
France							
1992/93	10,392	31,546	82,726	124,664	3,655	117,025	3,984
1993/94	3,984	45,319	79,420	128,723	4,500	120,000	4,223
1994/95	4,223	46,000	80,000	130,223	5,000	122,000	3,223
Greece							
1992/93	3,553	16,677	7,020	27,250	4,998	19,000	3,252
1993/94	3,252	20,780	5,000	29,032	6,000	20,000	3,032
1994/95	3,032	21,500	5,000	29,532	6,000	21,000	2,532
Italy							
1992/93	315,000	1,228,000	0	1,543,000	466,000	830,000	217,000
1993/94	247,000	1,367,000	4,000	1,618,000	650,000	835,000	133,000
1994/95	133,000	1,400,000	4,000	1,537,000	600,000	840,000	97,000
Spain							
1992/93	18,000	200,000	100	218,100	34,000	169,100	15,000
1993/94	15,000	250,000	100	265,100	60,000	173,100	32,000
1994/95	32,000	250,000	100	282,100	65,000	176,100	41,000
Brazil							
1992/93	0	21,000	517	21,517	1,630	19,887	0
1993/94	0	25,000	813	25,813	4,144	21,669	0
1994/95	0	33,000	0	33,000	6,000	27,000	0
Total							
1992/93	346,945	1,449,000	90,363	1,934,531	510,283	1,155,012	239,236
1993/94	269,236	1,708,099	89,333	2,066,668	724,644	1,169,769	172,255
1994/95	172,255	1,750,500	89,100	2,011,855	682,000	1,186,100	143,755

Source: U.S. Agricultural Attache Reports. 1/ Includes whole peeled, and/or wedged, diced, crushed, and other non concentrated products. 2/ Marketing years are July-June with the exception of France's which is August-July, and Brazil's which is May-April. Note: For calendar year reference, 1992/93 MY would become 1992 CY.

TOMATO PASTE: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
Metric Tons Net Weight, 28-30 percent TSS Basis; Preliminary 1992/93, Forecast 1994/95

Marketing Year 1/	Beginning Stocks	Production	Imports	Supply/ Distribution	Exports	Domestic Consumption	Ending Stocks
France							
1992/93	14,311	35,266	38,854	88,431	2,229	74,954	11,248
1993/94	11,248	32,435	36,130	79,813	3,400	73,400	3,013
1994/95	3,013	40,000	37,000	80,013	2,500	74,000	3,513
Greece							
1992/93	57,142	162,983	1,138	221,263	209,634	10,500	1,129
1993/94	1,129	172,620	1,500	175,249	164,200	10,500	549
1994/95	549	178,000	1,000	179,549	160,000	10,000	9,549
Italy							
1992/93	126,000	301,000	47,000	474,000	200,000	76,000	198,000
1993/94	198,000	325,000	45,000	568,000	270,000	75,000	223,000
1994/95	223,000	300,000	40,000	563,000	250,000	74,000	239,000
Portugal							
1992/93	52,170	84,559	0	136,729	98,726	15,100	5,000
1993/94	22,903	96,289	0	119,192	98,992	15,200	5,000
1994/95	5,000	146,000	0	151,000	130,700	15,300	5,000
Spain							
1992/93	33,000	94,300	2,500	129,800	52,800	49,000	28,000
1993/94	28,000	111,600	1,500	141,100	70,000	51,100	20,000
1994/95	20,000	116,000	1,000	137,000	73,000	53,000	11,000
Total EU							
1992/93	282,623	678,108	89,492	1,050,223	563,389	225,554	243,377
1993/94	261,280	737,944	84,130	1,083,354	606,592	225,200	251,562
1994/95	251,562	780,000	79,000	1,110,562	616,200	226,300	268,062
Turkey							
1992/93	125,000	230,000	5,367	360,367	156,158	75,209	129,000
1993/94	129,000	150,000	931	279,931	117,219	78,712	84,000
1994/95	84,000	220,000	0	304,000	140,000	82,000	82,000
Chile							
1992/93	9,030	88,570	0	97,600	84,868	11,700	1,032
1993/94	1,032	76,050	0	77,082	64,310	11,800	972
1994/95	972	94,000	0	94,972	82,500	11,895	577
Mexico							
1992/93	0	7,800	8,000	15,800	7,800	8,000	0
1993/94	0	52,500	0	52,500	46,000	6,500	0
1994/95	0	60,000	0	60,000	53,350	6,500	0
Brazil							
1992/93	0	33,000	5,370	38,370	6,862	31,508	0
1993/94	0	40,000	12,714	52,714	10,977	41,737	0
1994/95	0	56,000	15,000	71,000	18,000	53,000	0
Grand Total							
1992/93	416,653	1,037,478	108,229	1,562,360	819,077	351,971	373,409
1993/94	391,312	1,056,494	97,775	1,545,581	845,088	363,949	336,534
1994/95	336,534	1,210,000	94,000	1,640,534	910,050	379,695	350,639

Source: U.S. Agricultural Attache Reports. 1/ Marketing years are July-June with the exception of France's which is August-July, Brazil's which is May-April, and Mexico's which is March-February. Note: For calendar year reference, 1992/93 MY would become 1992 CY.

U.S. Imports of Canned Tomatoes 1/
(Metric Tons)

Country	1991/92	1992/93	1993/94 2/
Italy	11,649	15,715	13,447
Spain	1,902	1,156	2,276
Others	0	54	55
Total European Union	13,551	16,925	15,778
Argentina	1,527	678	0
Brazil	237	380	400
Chile	13,581	16,898	7,891
Others	0	19	1
Total South America	15,345	17,975	8,292
Canada	842	827	1,351
Israel	12,361	7,927	9,006
Turkey	1,927	2,468	1,723
All Others	1,228	286	389
Grand Total	45,254	46,408	36,539

1/ Marketing Year July-June. 2/ July 1993 to April 1994. Source: U.S. Department of Commerce, Bureau of the Census. Note: The above statistics include the following HTS (Harmonized Tariff Schedule) commodity codes: 2002900050, 2002100020, 2002100040, 2002100050, and 2002100090.

U.S. Imports of Tomato Sauce 1/
(Metric Tons)

Country	1991/92	1992/93	1993/94 2/
Italy	613	195	156
Chile	1,252	1,357	289
Canada	638	3,200	2,606
Dominican Republic	1,205	1,463	600
Jamaica	132	52	24
Mexico	4	3	8
China, Peoples Rep.	0	0	427
Others	253	110	154
Grand Total	4,097	6,380	4,262

1/ Marketing Year July-June. 2/ July 1993 to April 1994. Source: U.S. Department of Commerce, Bureau of the Census. Note: The above statistics include the following HTS (Harmonized Tariff Schedule) commodity codes: 2103204020 and 2103204040.

U.S. Imports of Tomato Paste and Puree 1/
(Metric Tons)

Country	1991/92	1992/93	1993/94 2/
Mexico	10,791	20,312	8,991
Chile	8,134	7,789	3,535
Italy	791	1,025	1,252
Hungary	1,592	798	516
Israel	1,948	776	1,330
Turkey	135	368	221
Spain	132	332	1,291
Canada	0	1,439	3,214
Brazil	8	426	58
China, Peoples Rep.	0	0	313
Others	767	496	625
Grand Total	24,298	33,761	21,346

1/ Marketing Year July-June. 2/ July 1993 to April 1994. Source: U.S. Department of Commerce, Bureau of the Census. Note: The above statistics include the following HTS (Harmonized Tariff Schedule) commodity codes: 2002900010, 2002900030, and 2002900040.

U.S. Imports of Ketchup 1/
(Metric Tons)

Country	1991/92	1992/93	1993/94 2/
Canada	53	186	349
Ecuador	0	18	0
Chile	52	0	0
United Kingdom	5	5	4
Turkey	1	4	0
Israel	0	6	0
Others	14	7	6
Grand Total	125	226	359

1/ Marketing Year July-June. 2/ July 1993 to April 1994. Source: U.S. Department of Commerce, Bureau of the Census. Note: The above statistics include the following HTS (Harmonized Tariff Schedule) commodity code: 2103202000.

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
APRIL 94

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	VALUE (1,000 DOLLARS) CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT											
FR. APPLES(JUL)	MT										
TAIWAN		6,037	3,245	110,200	90,100	113,733	2,684	2,023	73,625	70,080	75,230
MEXICO		13,670	24,340	70,988	113,112	99,364	6,868	13,991	35,164	64,637	49,551
CANADA		7,685	6,237	70,717	66,317	83,089	4,544	4,756	47,035	49,850	55,313
HONG KONG		3,397	5,490	40,747	50,671	47,234	2,105	2,798	23,518	28,299	27,786
OTHER		5,961	14,312	136,789	188,417	145,925	3,748	7,984	87,211	103,314	92,820
Subtotal:-----		36,750	53,625	429,441	508,617	489,346	19,950	31,552	266,552	316,180	300,700
FR. PEARS(JUL)	MT										
CANADA		1,648	2,067	32,416	35,463	34,899	1,244	1,277	22,975	23,731	25,100
MEXICO		2,466	5,799	29,436	43,221	34,222	1,326	2,803	14,701	21,608	17,370
TAIWAN		942	1,308	6,118	6,069	6,157	521	747	4,089	3,568	4,145
SWEDEN		32	0	5,790	6,214	5,790	21	0	2,657	2,232	2,657
OTHER		549	56	19,069	20,361	19,289	377	36	11,544	11,267	11,673
Subtotal:-----		5,637	9,229	92,829	111,327	100,358	3,490	4,863	55,966	62,406	60,944
APRICOTS(MAY)	MT										
CANADA		6	0	3,091	3,030	3,091	10	0	3,508	4,043	3,508
MEXICO		0	0	497	1,515	497	0	0	394	1,183	394
EU		0	0	464	317	464	0	0	1,263	955	1,263
UNITED KINGDOM		0	0	426	224	426	0	0	1,118	748	1,118
OTHER		14	32	440	354	440	30	20	630	487	630
Subtotal:-----		20	32	4,492	5,216	4,492	40	20	5,794	6,667	5,794
FR CHERRIES(MAY)	MT										
JAPAN		0	0	12,162	12,467	12,162	0	0	61,991	77,333	61,991
CANADA		7	0	9,607	6,235	9,607	19	0	18,106	13,376	18,106
EU		60	2	3,521	1,942	3,521	215	6	11,520	7,073	11,520
UNITED KINGDOM		0	0	2,634	1,241	2,634	0	0	8,726	4,592	8,726
HONG KONG		0	0	2,553	1,847	2,553	0	0	5,643	5,550	5,643
TAIWAN		1	0	2,082	2,140	2,082	3	0	4,211	4,705	4,211
OTHER		3	9	1,073	794	1,073	16	37	3,381	2,659	3,381
Subtotal:-----		71	11	30,998	25,424	30,998	252	43	104,852	110,696	104,852
PEACH-NECTRN(MAY)	MT										
CANADA		185	138	51,461	48,374	51,461	277	203	44,175	45,185	44,175
MEXICO		0	24	8,975	6,214	8,975	0	13	4,857	3,374	4,857
TAIWAN		0	12	5,476	4,207	5,476	0	7	5,178	4,276	5,178
OTHER		98	41	3,773	4,472	3,773	73	33	3,400	3,910	3,400
Subtotal:-----		283	215	69,686	63,265	69,686	350	257	57,610	56,746	57,610
PLUM-PRUNES(MAY)	MT										
CANADA		134	79	25,485	23,302	25,485	178	111	20,756	23,412	20,756
TAIWAN		0	0	21,848	13,733	21,848	0	0	15,071	12,198	15,071
HONG KONG		0	0	8,470	7,995	8,470	0	0	6,609	6,825	6,609
EU		0	0	5,771	2,191	5,771	0	0	4,574	2,137	4,574
UNITED KINGDOM		0	0	5,154	2,105	5,154	0	0	4,172	1,988	4,172
OTHER		1	4	6,115	7,472	6,115	3	6	4,845	5,663	4,845
Subtotal:-----		135	83	67,689	54,692	67,689	181	116	51,855	50,234	51,855
FR AVOCADOS(OCT)	MT										
EU		1,384	22	2,280	1,477	5,269	1,474	42	2,548	1,386	5,644
CANADA		567	111	1,896	898	5,165	467	183	1,773	1,110	4,492
JAPAN		425	283	1,456	1,008	3,234	398	661	1,757	1,352	3,387
FRANCE		1,013	0	1,518	537	2,832	973	0	1,507	500	2,734
UNITED KINGDOM		302	22	660	469	1,854	350	42	850	446	2,086
OTHER		196	48	325	144	517	242	60	415	193	701
Subtotal:-----		2,573	464	5,957	3,528	14,186	2,582	946	6,492	4,041	14,224
FR KIWIFRUIT(OCT)	MT										
TAIWAN		1,050	340	3,542	1,990	3,554	1,716	632	5,685	3,556	5,702
CANADA		430	322	2,616	2,940	3,387	533	435	3,309	3,613	4,298
KOREA, REPUBLIC		116	341	469	1,665	538	202	566	740	3,017	798
OTHER		57	121	818	1,278	880	120	226	1,174	1,792	1,274
Subtotal:-----		1,653	1,125	7,445	7,873	8,359	2,572	1,858	10,909	11,979	12,071
FRESH GRAPES (MAY)	MT										
CANADA		1,046	1,315	104,410	111,233	104,410	1,464	2,018	103,958	123,408	103,958
HONG KONG		0	0	19,431	18,018	19,431	0	0	21,566	20,938	21,566
TAIWAN		0	0	14,944	13,330	14,944	0	0	16,199	17,239	16,199
OTHER		26	369	48,367	63,919	48,367	57	204	62,401	77,497	62,401
Subtotal:-----		1,072	1,684	187,152	206,500	187,152	1,520	2,221	204,124	239,081	204,124
FR STRAWBRIS(JAN)	MT										
CANADA		7,951	8,360	13,417	14,674	35,611	9,310	9,536	18,391	20,427	49,034
JAPAN		0	18	17	19	3,967	0	29	30	32	20,768
MEXICO		27	7	87	173	3,583	25	8	41	49	1,722
EU		58	82	268	421	2,319	136	160	733	980	4,977
OTHER		51	147	200	390	813	194	449	607	1,408	2,745
Subtotal:-----		8,086	8,614	13,988	15,677	46,293	9,665	10,182	19,803	22,896	79,245
FR ORNG INC TMPL(NOV)	MT										
CANADA		27,711	21,872	146,187	129,094	206,881	12,615	10,540	70,149	65,362	100,853
JAPAN		18,618	18,726	68,586	77,523	161,786	9,669	11,594	33,281	45,849	87,734
HONG KONG		15,532	17,428	65,773	57,258	128,569	6,977	9,247	31,299	30,301	61,277
OTHER		9,653	11,147	33,441	37,099	59,112	4,795	5,583	16,885	19,661	29,713
Subtotal:-----		71,514	69,174	313,988	300,974	556,348	34,056	36,964	151,615	161,172	279,578
FR GRPFRT(SEP)	MT										
JAPAN		40,973	39,853	171,142	207,396	222,775	18,730	20,878	84,946	109,577	108,744
EU		12,689	14,380	105,323	96,280	116,865	7,650	7,453	53,645	47,537	61,288
CANADA		7,483	7,061	54,810	59,098	69,444	3,350	2,556	26,955	24,479	34,612
FRANCE		4,981	6,302	47,571	37,492	51,050	2,557	3,328	23,569	19,611	25,344
NETHERLANDS		3,038	3,726	26,934	25,286	29,021	1,444	1,985	12,838	12,227	14,005
OTHER		6,260	3,909	23,756	23,238	31,919	3,023	1,876	11,711	11,287	15,609
Subtotal:-----		67,405	65,202	355,031	386,012	441,003	32,753	32,764	177,258	192,881	220,253
FR TANGERINES(NOV)	MT										
CANADA		354	832	8,266	9,906	8,616	359	724	7,196	7,736	7,582
EU		0	124	593	967	648	0	61	467	512	506
OTHER		40	4	159	492	180	21	4	226	476	254
Subtotal:-----		393	960	9,019	11,366	9,444	380	789	7,889	8,724	8,342
CANNED FRUIT											
CND PEACH&NECT(JUN)	MT										
JAPAN		406	555	4,978	4,580	5,812	443	594	5,443	5,199	6,391
CANADA		321	351	2,487	2,652	2,691	372	387	2,988	3,101	3,212
TAIWAN		159	185	2,218	1,668	2,460	126	170	1,877	1,456	2,106
MEXICO		77	42	1,494	1,367	1,775	57	37	1,212	1,034	1,421
HONG KONG		173	268	1,289	1,631	1,467	107	165	711	1,412	804
OTHER		665	364	5,054	5,415	5,611	541	275	4,604	4,682	5,033
Subtotal:-----		1,801	1,765	17,520	17,313	19,815	1,646	1,628	16,835	16,885	18,967

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
APRIL 94

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY					VALUE (1,000 DOLLARS)				
		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
CANNED FRUIT											
CND PEACH&NECT(JUN)	MT										
JAPAN		406	555	4,978	4,580	5,812	443	594	5,443	5,199	6,391
CANADA		321	351	2,487	2,652	2,691	372	387	2,988	3,101	3,212
TAIWAN		159	185	2,218	1,668	2,460	126	170	1,877	1,456	2,106
MEXICO		77	42	1,494	1,367	1,775	57	37	1,212	1,034	1,421
HONG KONG		173	268	1,289	1,631	1,467	107	165	711	1,412	804
OTHER		665	364	5,054	5,415	5,611	541	275	4,604	4,682	5,033
Subtotal:-----		1,801	1,765	17,520	17,313	19,815	1,646	1,628	16,835	16,885	18,967
CND PEARS(JUN)	MT										
CANADA		154	167	1,417	1,450	1,508	150	179	1,469	1,492	1,579
EU		2	7	693	118	709	3	6	868	143	886
JAPAN		40	0	449	371	506	57	0	500	411	555
UNITED KINGDOM		0	0	466	0	466	0	0	662	0	662
MEXICO		0	0	318	148	321	0	0	308	139	310
OTHER		65	30	825	625	861	57	23	705	492	740
Subtotal:-----		261	203	3,702	2,713	3,905	266	208	3,849	2,677	4,071
CND PNEAPL(JAN)	MT										
JAPAN		61	36	335	305	1,371	63	33	334	309	1,300
CANADA		123	54	518	314	1,354	89	53	488	284	1,306
MEXICO		78	18	188	54	786	64	15	154	43	643
EU		0	0	127	110	533	0	0	119	94	476
GERMANY		0	0	49	110	245	0	0	46	94	224
OTHER		11	35	130	79	373	7	33	116	79	253
Subtotal:-----		273	142	1,299	861	4,417	223	134	1,212	809	3,977
FRT MIXTURES(JUN)	MT										
CANADA		795	296	6,056	5,347	6,542	932	330	8,083	6,646	8,786
JAPAN		909	529	4,150	5,598	4,708	1,098	656	4,874	6,739	5,512
HONG KONG		742	453	3,439	3,648	3,753	732	453	2,760	3,831	3,071
PHILIPPINES		10	33	3,324	1,151	3,337	12	44	3,474	1,350	3,489
SAUDI ARABIA		136	5	3,084	1,387	3,096	148	7	2,476	1,729	2,496
SINGAPORE		156	92	2,471	2,180	2,662	156	105	2,601	2,399	2,833
OTHER		747	416	10,236	6,099	10,797	820	515	10,393	7,340	11,198
Subtotal:-----		3,494	1,824	32,761	25,410	34,896	3,899	2,109	34,661	30,033	37,386
DRIED FRUIT											
DRD RAISINS(AUG)	MT										
EU		3,727	3,562	42,822	39,440	56,420	5,403	5,458	56,687	59,356	76,224
UNITED KINGDOM		1,711	2,178	18,751	19,545	25,585	2,536	3,273	25,608	30,221	35,568
JAPAN		1,459	2,274	16,921	18,875	23,290	2,038	3,367	22,254	28,016	31,573
GERMANY		834	378	10,325	9,500	13,256	1,116	489	13,091	12,581	17,158
CANADA		659	927	8,284	8,799	10,832	1,344	1,756	17,316	18,463	22,715
DENMARK		489	519	5,644	4,505	7,205	651	771	6,949	6,513	8,998
OTHER		1,764	2,299	29,279	29,031	35,256	2,793	3,752	39,771	46,168	49,675
Subtotal:-----		7,609	9,064	97,306	96,145	125,798	11,578	14,335	136,028	152,003	180,188
DRD PRUNES(AUG)	MT										
EU		4,874	1,870	40,603	21,833	48,625	6,071	4,709	56,238	49,828	69,456
GERMANY		2,232	717	14,475	8,566	17,419	2,562	1,695	17,462	19,352	21,920
JAPAN		1,357	1,196	11,773	10,785	15,311	2,292	3,090	18,975	24,473	25,815
ITALY		1,041	302	10,170	4,825	11,874	1,557	908	17,234	12,774	20,608
UNITED KINGDOM		555	341	6,112	2,778	7,498	615	799	7,378	5,121	9,401
CANADA		400	529	3,846	3,765	5,052	800	1,312	8,388	8,846	10,820
OTHER		1,423	806	16,219	11,477	18,937	2,055	1,869	23,295	24,570	28,288
Subtotal:-----		8,053	4,401	72,441	47,861	87,925	11,218	10,980	106,896	107,717	134,380
FRUIT JUICES(SSE)											
ORANGE JU CNC (DEC)	KL										
EU		18,063	5,405	44,649	27,659	107,753	5,559	3,523	16,448	13,199	42,269
CANADA		8,795	2,019	49,810	11,881	99,111	3,918	3,559	22,211	19,721	46,741
FRANCE		2,443	701	17,355	14,819	42,560	994	327	7,157	6,217	18,467
JAPAN		4,421	3,027	16,013	14,206	37,807	1,740	2,847	6,295	10,111	15,138
KOREA, REPUBLIC		3,181	5,316	10,486	12,108	30,421	1,332	1,944	4,339	6,795	13,872
NETHERLANDS		9,319	3,825	11,357	5,409	19,427	1,411	2,705	2,218	3,429	4,744
OTHER		4,993	5,014	22,625	21,147	64,198	1,562	2,155	8,010	8,451	22,064
Subtotal:-----		39,452	20,781	143,582	87,001	339,290	14,111	14,029	57,303	58,277	140,085
ORNG JU NTCNC(DEC)	KL										
CANADA		3,803	4,237	17,534	25,764	47,869	2,753	2,755	13,668	17,025	34,699
EU		1,678	3,729	7,322	10,595	23,888	1,086	2,736	5,065	6,664	15,598
FRANCE		1,014	578	5,005	2,191	8,423	737	377	3,665	1,396	5,770
BELGIUM-LUXEMBOU		65	2,319	308	3,413	6,262	59	1,409	223	2,101	4,278
UNITED KINGDOM		562	321	1,683	3,318	5,108	254	199	1,015	1,940	3,071
SWEDEN		506	125	1,837	1,009	4,763	572	93	2,087	917	5,257
OTHER		1,950	1,408	6,877	7,066	16,194	1,358	1,040	4,934	5,432	12,453
Subtotal:-----		7,938	9,499	33,570	44,434	92,714	5,770	6,624	25,754	30,038	68,006
GRPFRT JU CNC (DEC)	KL										
JAPAN		4,069	2,971	12,883	7,039	28,127	2,649	3,010	8,772	9,005	19,417
EU		4,610	762	9,466	3,782	20,014	2,349	531	4,301	1,901	9,297
NETHERLANDS		2,344	489	3,525	864	7,935	1,133	408	1,800	605	3,861
CANADA		1,071	262	3,644	800	7,066	771	444	2,624	1,352	5,268
FRANCE		317	0	1,358	1,323	4,002	137	0	583	527	1,807
UNITED KINGDOM		1,107	117	2,897	952	3,785	532	45	1,033	334	1,353
OTHER		432	322	1,036	1,542	2,390	204	316	532	995	1,376
Subtotal:-----		10,182	4,317	27,030	13,163	57,597	5,974	4,300	16,229	13,253	35,358
FRESH VEGETABLES											
FR ASPARAGUS(OCT)	MT										
CANADA		1,386	2,039	3,735	3,637	9,868	3,142	4,469	8,734	8,901	21,592
JAPAN		2,837	3,517	6,429	8,802	7,498	11,261	12,805	24,626	33,246	29,584
EU		448	410	1,580	1,205	1,866	1,305	858	4,656	3,218	5,507
SWITZERLAND		576	595	1,695	2,170	1,794	1,619	1,834	4,664	7,046	4,985
OTHER		32	53	74	104	264	108	222	267	446	846
Subtotal:-----		5,279	6,614	13,513	15,917	21,289	17,435	20,188	42,947	52,857	62,514
FR ONIONS(OCT)	MT										
CANADA		7,477	7,551	53,775	47,119	117,151	4,825	2,973	24,485	22,560	47,955
JAPAN		10	292	2,130	5,023	28,107	6	107	519	1,767	9,044
MEXICO		28	48	17,433	8,962	21,278	10	32	5,602	2,711	6,759
OTHER		36	1,663	8,368	8,768	16,469	34	450	4,772	4,041	8,083
Subtotal:-----		7,552	9,554	81,707	69,873	183,006	4,875	3,562	35,378	31,079	71,841
CANNED VEGETABLES											
CND SWT CORN(AUG)	MT										
EU		5,211	1,431	40,589	32,089	55,436	3,608	1,029	29,026	23,020	39,589
JAPAN		3,451	5,314	36,421	45,998	50,125	2,896	4,034	29,265	36,499	39,778
UNITED KINGDOM		2,293	875	16,594	9,209	21,814	1,589	601	11,682	6,425	15,301
GERMANY		1,341	236	13,520	7,749	17,723	947	189	9,808	5,601	12,902
TAIWAN		2,348	1,171	14,659	11,175	17,512	1,964	987	12,893	10,004	15,497
HONG KONG		2,013	889	12,816	10,241	15,846	877	727	6,270	7,936	8,313
OTHER		3,483	2,369	23,632	21,821	33,205	2,698	2,034	18,325	18,131	25,641
Subtotal:-----		16,506	11,174	128,116	121,325	172,124	12,043	8,810	95,779	95,590	128,818

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
APRIL 94

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
CANNED VEGETABLES											
CND TOM PAS(JUL)	MT										
CANADA		2,755	3,159	39,031	35,603	46,004	2,374	2,819	32,112	30,610	38,098
KOREA, REPUBLIC		334	212	4,507	4,447	4,638	270	207	3,762	4,057	3,875
JAPAN		450	670	3,260	7,267	3,835	330	509	2,424	6,022	2,842
PHILIPPINES		425	38	3,205	3,248	3,517	290	34	2,226	2,344	2,434
OTHER		764	738	7,171	16,742	8,816	645	595	5,778	12,933	7,157
Subtotal:-----		4,728	4,818	57,175	67,307	66,811	3,909	4,163	46,303	55,965	54,406
CND TOM SAUCE(JUL)	MT										
CANADA		3,875	3,383	37,785	39,123	46,201	3,639	3,389	37,481	39,984	45,466
MEXICO		413	573	4,580	4,983	6,169	292	387	2,981	3,194	3,913
JAPAN		449	355	4,739	4,373	5,500	409	589	4,245	4,951	4,941
OTHER		1,197	1,701	9,949	13,945	11,559	1,096	2,043	10,044	14,933	11,773
Subtotal:-----		5,933	6,012	57,053	62,425	69,428	5,435	6,409	54,752	63,062	66,093
FRZN VEGETABLES											
FZN SWT CORN(JUL)	MT										
JAPAN		2,911	3,361	29,134	34,346	35,306	2,407	3,096	25,158	30,727	30,277
AUSTRALIA		315	204	4,831	4,886	5,498	214	154	3,648	3,664	4,164
HONG KONG		318	236	3,970	3,566	4,516	251	190	2,777	2,718	3,163
MEXICO		297	129	2,841	2,163	3,366	167	86	1,797	1,356	2,114
CANADA		143	436	2,747	2,686	3,041	95	364	1,959	2,172	2,133
OTHER		679	722	6,585	6,383	8,026	616	548	5,425	5,686	6,687
Subtotal:-----		4,663	5,089	50,108	54,030	59,754	3,751	4,438	40,763	46,323	48,538
FZN F FRY(JUL)	MT										
JAPAN		10,491	12,347	102,283	111,636	123,736	7,438	8,806	71,056	78,935	86,084
KOREA, REPUBLIC		1,518	1,953	11,119	14,560	13,959	1,087	1,355	8,540	9,619	10,376
HONG KONG		1,036	1,353	9,191	9,937	11,260	627	869	5,744	6,406	7,107
OTHER		4,170	6,490	44,723	62,134	53,587	3,067	4,835	33,325	45,991	40,111
Subtotal:-----		17,215	22,143	167,317	198,267	202,543	12,220	15,865	118,665	140,950	143,678
TREE NUTS											
ALMONDS UNSH(JUL)	MT										
INDIA		346	178	8,382	3,618	8,926	872	533	12,877	10,447	14,037
JAPAN		231	705	3,418	5,394	3,905	560	2,111	10,005	13,574	11,168
EU		64	0	1,088	669	1,108	130	0	1,752	1,232	1,832
OTHER		180	92	2,283	1,811	2,374	663	278	5,412	4,453	5,626
Subtotal:-----		821	974	15,171	11,492	16,313	2,226	2,922	30,046	29,706	32,664
ALMND SH/PREP(JUL)	MT										
EU		6,135	8,579	86,079	79,740	95,640	22,395	39,036	281,880	351,899	316,044
GERMANY		2,457	2,820	43,282	34,935	47,451	9,032	10,538	136,792	148,204	151,505
JAPAN		1,508	738	17,422	16,953	19,947	5,868	4,174	64,564	87,005	74,387
UNITED KINGDOM		1,000	1,051	11,259	10,570	12,584	3,463	4,843	36,296	44,208	40,895
NETHERLANDS		613	945	10,927	10,071	12,274	2,228	4,581	39,440	47,151	44,608
CANADA		595	693	8,473	8,619	9,996	1,889	3,140	28,824	34,895	34,463
OTHER		2,809	2,930	37,947	36,438	42,887	10,284	12,565	121,763	155,225	139,537
Subtotal:-----		11,048	12,940	149,920	141,750	168,469	40,436	58,916	497,031	629,024	564,432
WALNUTS SH(AUG)	MT										
EU		22	80	8,112	6,549	8,339	134	285	20,488	14,089	20,982
JAPAN		206	360	2,564	3,760	3,843	1,019	1,957	11,166	20,398	16,726
GERMANY		14	18	3,063	868	3,280	83	18	6,646	2,087	7,106
CANADA		108	77	2,120	1,666	2,353	512	278	8,368	5,351	9,456
SPAIN		8	46	1,803	1,245	1,807	51	242	4,817	3,596	4,833
ITALY		0	9	1,013	2,199	1,013	0	10	2,074	4,022	2,074
OTHER		172	376	3,546	4,169	4,023	675	1,467	12,199	17,445	14,533
Subtotal:-----		508	893	16,341	16,145	18,558	2,340	3,987	52,221	57,284	61,696
WALNUTS UNSH(AUG)	MT										
EU		2	434	30,596	36,289	30,827	4	819	61,266	68,778	61,544
SPAIN		0	19	9,993	9,708	9,993	0	34	19,606	18,331	19,606
GERMANY		0	315	6,589	8,593	6,675	0	565	13,403	16,217	13,521
NETHERLANDS		0	3	5,541	8,539	5,551	0	16	11,599	16,345	11,635
ITALY		0	59	4,501	5,889	4,501	0	105	8,853	11,343	8,853
OTHER		106	143	5,976	7,176	6,371	249	274	13,078	15,104	13,918
Subtotal:-----		108	577	36,572	43,465	37,199	253	1,093	74,344	83,882	75,463
HOPS&PRODUCTS											
HOP PELTS(SEP)	MT										
BRAZIL		35	4	1,098	845	1,369	203	28	5,041	3,865	6,191
CANADA		103	91	614	746	1,041	679	589	4,199	4,975	7,124
EU		71	19	621	473	724	703	82	3,981	2,770	4,588
MEXICO		18	83	144	176	483	120	603	964	1,218	3,291
COLOMBIA		0	0	443	54	443	0	0	3,510	322	3,510
GERMANY		6	19	307	145	335	30	82	1,636	646	1,819
OTHER		38	87	849	746	1,053	222	303	4,883	3,153	5,98
Subtotal:-----		264	283	3,769	3,040	5,113	1,926	1,604	22,578	16,304	30,688
HOP EXTRACT(SEP)	MT										
EU		141	86	1,204	932	1,458	2,903	1,035	19,838	13,864	24,964
GERMANY		54	35	605	345	710	579	333	9,836	4,386	11,849
MEXICO		0	68	671	1,754	706	0	785	11,718	12,092	12,127
BRAZIL		29	12	378	406	402	482	199	2,592	3,873	3,040
NETHERLANDS		35	1	171	196	278	991	14	2,865	4,453	5,119
KOREA, REPUBLIC		33	0	98	70	258	670	0	1,667	1,196	2,668
OTHER		57	66	866	809	1,081	1,035	742	18,587	15,473	22,356
Subtotal:-----		261	231	3,218	3,970	3,905	5,090	2,760	54,402	46,498	65,154
HOPS,NSPF(SEP)	MT										
EU		138	13	2,041	1,005	2,073	479	76	10,660	4,419	10,842
GERMANY		137	13	1,649	729	1,662	474	76	8,322	2,841	8,379
UNITED KINGDOM		1	0	298	268	305	5	0	1,818	1,468	1,856
JAPAN		0	0	204	231	206	0	0	1,143	1,417	1,149
OTHER		23	117	270	372	333	283	861	3,101	3,562	4,091
Subtotal:-----		161	131	2,515	1,608	2,612	762	937	14,904	9,398	16,082
WINE											
GRAPE WINE(JAN)	KL										
EU		4,511	3,112	14,438	9,020	45,115	6,546	5,514	19,864	16,241	66,545
CANADA		2,494	2,350	10,066	10,342	32,584	3,321	3,177	12,695	13,040	45,078
UNITED KINGDOM		2,134	1,620	6,483	4,238	24,121	3,405	3,060	10,059	8,296	38,803
JAPAN		863	977	3,414	3,909	12,347	1,166	1,532	5,013	6,082	17,774
DENMARK		1,024	277	3,108	1,073	6,559	973	272	2,663	1,181	6,312
OTHER		2,071	4,210	8,008	12,806	26,903	2,712	4,203	10,665	15,765	36,079
Subtotal:-----		9,938	10,648	35,925	36,076	116,948	13,745	14,427	48,238	51,127	165,476

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
APRIL 94

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR FRT & MLNS											
FR APPLES(JUL)	MT										
NEW ZEALAND		10,119	5,596	10,694	8,330	28,513	9,441	4,752	10,013	7,785	30,602
CANADA		4,468	1,574	41,434	28,377	46,611	1,566	896	14,662	12,819	16,772
OTHER		5,969	11,160	15,979	27,381	35,277	1,835	4,717	6,528	12,868	18,006
Subtotal:-----		20,556	18,330	68,107	64,088	110,401	12,843	10,365	31,203	33,472	65,380
FR PEARS(JUL)	MT										
CHILE		8,282	5,709	38,029	33,337	44,689	2,650	1,855	12,605	11,894	14,858
ARGENTINA		2,633	2,351	9,323	9,226	14,604	1,716	1,230	5,921	5,012	9,230
OTHER		957	2,522	3,228	5,314	5,479	923	2,289	6,258	8,057	8,178
Subtotal:-----		11,872	10,582	50,580	47,876	64,772	5,288	5,374	24,783	24,963	32,266
APRICOT (MAY)	MT										
CHILE		0	0	699	781	699	0	0	441	489	441
NEW ZEALAND		0	0	158	157	158	0	0	405	283	405
OTHER		18	0	55	103	55	40	0	132	221	132
Subtotal:-----		18	0	911	1,042	911	40	0	978	993	978
PEACH-NEC(MAY)	MT										
CHILE		35	24	40,869	42,893	40,869	24	15	25,810	27,605	25,810
OTHER		105	0	1,088	252	1,088	193	0	997	240	997
Subtotal:-----		140	24	41,956	43,145	41,956	218	15	26,807	27,844	26,807
PLUM-PRUNE(MAY)	MT										
CHILE		1,962	2,261	23,893	21,389	23,893	1,234	1,404	15,116	14,143	15,116
OTHER		0	111	98	233	98	0	98	80	215	80
Subtotal:-----		1,962	2,372	23,990	21,621	23,990	1,234	1,502	15,196	14,358	15,196
FRESH GRAPES (MAY)	MT										
CHILE		39,973	52,414	284,846	265,879	284,846	27,634	38,340	207,103	201,749	207,103
MEXICO		0	26	37,056	41,331	37,056	0	26	67,144	55,237	67,144
OTHER		82	287	2,023	1,566	2,023	65	402	854	1,482	854
Subtotal:-----		40,056	52,728	323,924	308,775	323,924	27,698	38,768	275,101	258,468	275,101
FR RASPBRY(JAN)	MT										
CANADA		0	0	0	0	5,122	0	0	0	0	9,292
OTHER		95	168	475	689	774	126	296	722	1,162	1,484
Subtotal:-----		95	168	475	689	5,896	126	296	722	1,162	10,776
FR STRAWBRIS(JAN)	MT										
MEXICO		2,948	5,618	8,818	13,125	12,747	3,028	9,917	14,545	26,111	17,985
OTHER		0	0	241	92	1,480	0	0	421	197	3,491
Subtotal:-----		2,948	5,618	9,059	13,217	14,227	3,028	9,917	14,966	26,308	21,476
FR BANANA(JAN)	MT										
COSTA RICA		54,844	54,566	296,026	238,072	922,519	16,922	17,314	88,622	70,030	272,504
ECUADOR		67,371	72,395	261,177	276,556	761,367	19,246	19,453	72,520	71,936	205,877
COLOMBIA		39,002	51,460	183,200	219,947	596,321	11,453	15,670	52,120	64,803	166,146
OTHER		102,470	99,392	390,192	394,269	1,232,936	31,451	30,983	116,571	106,084	350,376
Subtotal:-----		263,687	277,813	1,130,595	1,128,844	3,513,144	79,072	83,420	329,833	312,853	994,903
FR MANGO(JAN)	MT										
MEXICO		13,682	13,147	19,164	16,691	94,439	13,229	13,962	19,116	16,970	71,626
OTHER		2,804	2,259	6,564	5,363	16,518	1,781	1,390	5,827	4,816	15,619
Subtotal:-----		16,486	15,406	25,728	22,054	110,957	15,009	15,352	24,943	21,786	87,245
FR PINAPLE(JAN)	MT										
COSTA RICA		5,609	5,182	23,216	23,389	72,226	2,494	2,012	10,125	9,437	30,880
HONDURAS		2,267	2,070	8,989	10,988	26,273	618	573	2,416	3,026	7,482
OTHER		2,317	1,135	11,526	4,076	25,896	551	288	2,768	1,094	6,986
Subtotal:-----		10,193	8,388	43,731	38,453	124,395	3,663	2,872	15,308	13,557	45,348
FR CANTLPE(MAY)	MT										
MEXICO		24,099	17,822	104,864	63,603	104,864	5,474	4,875	29,666	17,851	29,666
COSTA RICA		10,911	14,782	35,094	43,061	35,094	6,350	5,816	19,796	18,971	19,796
HONDURAS		10,074	15,926	55,437	64,399	55,437	2,524	3,698	14,510	14,716	14,510
OTHER		9,739	14,091	45,451	56,159	45,451	2,570	4,044	11,533	16,045	11,533
Subtotal:-----		54,822	62,620	240,846	227,221	240,846	16,918	18,432	75,505	67,583	75,505
FR MELON,OT(MAY)	MT										
MEXICO		6,183	5,306	51,787	40,290	51,787	1,805	2,105	17,944	14,546	17,944
COSTA RICA		8,044	8,242	24,845	29,573	24,845	3,504	3,031	11,269	11,703	11,269
OTHER		8,270	6,663	45,268	44,425	45,268	2,894	1,955	14,826	14,557	14,826
Subtotal:-----		22,497	20,211	121,899	114,288	121,899	8,203	7,092	44,039	40,806	44,039
FR ORANGES(NOV)	MT										
AUSTRALIA		1	0	1	0	4,556	3	0	3	2	6,267
OTHER		370	619	3,655	3,823	5,795	84	191	1,426	1,744	2,007
Subtotal:-----		371	619	3,656	3,824	10,350	87	191	1,428	1,756	8,274
CANNED FRUIT											
CND MANDRN(JAN)	MT										
EU		2,099	2,876	7,749	12,164	19,589	1,928	2,172	7,230	9,233	18,494
SPAIN		2,099	2,876	7,748	12,030	19,569	1,928	2,172	7,228	9,111	18,474
CHINA, PEOPLES R		1,664	1,568	4,520	4,388	19,713	1,414	1,235	3,823	3,190	16,285
OTHER		76	47	295	152	988	83	50	372	157	1,163
Subtotal:-----		3,839	4,491	12,565	16,704	40,290	3,425	3,458	11,425	12,581	35,942
CND BLK OLV(NOV)	MT										
EU		1,268	947	5,680	6,951	12,275	2,562	1,906	12,159	13,146	24,927
SPAIN		1,090	828	4,797	5,824	10,260	2,153	1,632	9,815	10,607	19,913
MOROCCO		82	267	1,311	1,334	2,661	132	486	2,352	2,345	4,733
OTHER		14	2	62	81	125	27	3	108	136	236
Subtotal:-----		1,364	1,216	7,053	8,366	15,061	2,722	2,395	14,620	15,628	29,896
CND GRN OLV(NOV)	MT										
EU		3,604	3,657	20,592	19,255	41,192	8,952	9,503	54,152	48,818	104,739
SPAIN		3,539	3,615	20,130	18,856	40,160	8,828	9,424	53,360	48,118	102,781
OTHER		171	227	1,037	1,083	2,058	280	321	1,646	1,502	3,331
Subtotal:-----		3,774	3,884	21,629	20,338	43,249	9,232	9,824	55,797	50,320	108,070
CND PEACH(JUN)	MT										
EU		389	1,019	19,515	15,319	20,063	236	577	13,405	8,813	13,745
GREECE		389	1,014	18,479	14,107	19,021	236	566	12,668	8,045	12,996
OTHER		94	38	1,671	4,216	1,858	62	30	1,240	2,152	1,363
Subtotal:-----		483	1,057	21,186	19,535	21,921	298	606	14,645	10,966	15,109
CND PINAPLE(JAN)	MT										
THAILAND		16,356	14,866	63,820	60,020	172,014	10,507	7,873	41,134	31,524	101,834
PHILIPPINES		11,037	11,384	42,971	49,169	128,465	7,515	7,578	29,904	33,255	88,280
OTHER		2,438	2,572	10,083	13,301	41,758	1,557	1,218	5,404	5,261	16,877
Subtotal:-----		29,832	28,822	116,873	122,489	342,237	19,579	16,669	76,443	70,040	206,991
DRIED FRUIT											
DRD APRCT(JUL)	MT										
TURKEY		441	606	7,992	7,326	10,217	905	1,537	18,474	18,783	23,134
OTHER		12	25	219	487	299	31	71	516	1,218	729
Subtotal:-----		453	630	8,211	7,813	10,516	935	1,608	18,990	20,001	23,863

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
APRIL 94

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
DRIED FRUIT											
DATES(SEP)	MT										
PAKISTAN		451	656	2,931	2,930	3,720	485	640	3,218	3,000	4,036
CHINA, PEOPLES R		151	98	669	428	1,090	204	165	754	577	1,152
OTHER		69	79	600	390	689	142	85	1,162	752	1,330
Subtotal:-----		672	833	4,199	3,748	5,498	831	891	5,133	4,329	6,518
DRD FIG(SEP)	MT										
EU		0	0	969	761	969	0	0	2,403	1,820	2,403
GREECE		0	0	943	727	943	0	0	2,301	1,695	2,301
TURKEY		75	158	473	1,014	1,240	42	166	747	1,503	1,300
OTHER		0	0	356	1,263	562	0	0	172	614	266
Subtotal:-----		75	158	1,798	3,039	2,771	42	166	3,322	3,937	3,969
DRD RAISIN(AUG)	MT										
MEXICO		126	0	3,598	3,413	3,662	77	0	2,462	3,151	2,508
CHILE		61	82	430	588	1,441	79	106	512	724	1,774
TURKEY		80	99	1,069	1,949	1,526	85	103	1,158	1,985	1,655
OTHER		0	1	26	328	87	2	2	56	349	134
Subtotal:-----		267	181	5,123	6,278	6,717	244	211	4,187	6,210	6,070
FRUIT JUICE(SSE)											
APPLE JUIC(JUL)	KL										
EU		25,924	28,995	181,043	206,178	229,468	7,361	6,782	57,268	44,644	69,762
ARGENTINA		14,430	15,435	149,029	234,035	222,727	3,164	2,192	44,332	43,241	58,379
GERMANY		20,931	21,338	149,385	159,703	186,794	6,117	5,496	46,237	35,590	56,118
OTHER		26,358	41,321	311,401	420,643	369,967	7,534	7,232	104,264	85,136	118,171
Subtotal:-----		66,711	85,751	641,473	860,857	822,162	18,059	16,205	205,864	173,021	246,312
FCOJ(DEC)	KL										
BRAZIL		44,290	115,531	331,124	560,558	1,089,726	5,043	22,425	51,248	106,164	190,381
OTHER		16,344	29,420	49,531	109,367	137,517	2,630	7,812	9,063	27,229	25,686
Subtotal:-----		60,633	144,951	380,656	669,924	1,227,243	7,673	30,237	60,311	133,393	216,066
GRAPE JU(JAN)	KL										
SWEDEN		7,071	0	29,253	0	51,169	2,379	0	9,843	0	16,067
EU		913	6,302	1,760	11,345	24,178	501	3,392	1,047	6,012	8,460
OTHER		5,187	3,339	18,776	7,298	54,769	1,986	973	7,287	2,665	19,669
Subtotal:-----		13,171	9,641	49,789	18,643	130,116	4,865	4,366	18,178	8,677	44,196
PNEAPL JUCN(JAN)	KL										
THAILAND		19,632	6,343	64,773	43,313	156,558	4,226	766	13,566	7,536	30,322
PHILIPPINES		10,391	6,339	37,692	31,071	113,215	2,303	1,288	8,146	5,993	23,255
OTHER		3,276	1,337	10,300	6,810	24,227	892	338	2,933	1,718	6,782
Subtotal:-----		33,298	14,019	112,766	81,193	294,000	7,421	2,392	24,644	15,247	60,359
PNEAPL JUNC(JAN)	KL										
PHILIPPINES		579	3,420	8,170	15,406	29,454	224	1,079	3,040	5,193	10,933
OTHER		855	972	3,638	6,446	13,450	438	725	1,394	2,918	4,309
Subtotal:-----		1,434	4,392	11,808	21,852	42,904	661	1,804	4,434	8,111	15,242
FROZEN FRUIT											
FZN STRBRY(DEC)	MT										
MEXICO		4,037	3,118	11,501	10,939	18,446	3,615	2,979	10,850	10,455	17,277
OTHER		143	98	618	483	1,274	562	332	2,407	1,456	3,826
Subtotal:-----		4,181	3,217	12,119	11,421	19,720	4,178	3,312	13,257	11,910	21,103
FRESH VEGETABLES											
FR BEANS(OCT)	MT										
MEXICO		790	885	10,995	9,670	11,424	1,193	1,230	13,588	12,782	14,214
OTHER		27	25	119	273	729	29	27	184	205	783
Subtotal:-----		817	910	11,113	9,942	12,152	1,222	1,257	13,772	12,988	14,998
FR CARROT(OCT)	MT										
CANADA		383	1,263	30,198	35,530	39,943	131	307	7,893	8,428	10,429
MEXICO		1,802	1,791	8,166	8,520	10,923	527	538	2,368	2,137	3,267
OTHER		0	126	461	285	566	0	79	295	173	370
Subtotal:-----		2,186	3,180	38,825	44,336	51,432	658	924	10,555	10,739	14,067
FR CABBAGE(OCT)	MT										
CANADA		1,193	174	11,691	7,130	17,625	316	38	2,486	1,687	4,420
MEXICO		1,264	123	5,869	3,203	8,318	249	19	1,198	526	1,542
OTHER		61	12	177	157	871	66	11	135	59	565
Subtotal:-----		2,518	310	17,737	10,491	26,815	631	68	3,820	2,272	6,526
FR CELERY(OCT)	MT										
MEXICO		2,179	938	10,708	7,311	11,581	850	184	4,436	2,032	4,719
CANADA		0	23	614	422	4,643	0	13	142	147	1,340
OTHER		116	0	486	60	600	27	0	89	19	117
Subtotal:-----		2,294	961	11,808	7,794	16,823	876	198	4,666	2,197	6,176
FR CUCMBR(OCT	MT										
MEXICO		12,611	18,767	195,058	202,666	213,505	7,422	7,635	66,653	86,938	76,639
OTHER		2,674	1,588	21,820	16,918	25,337	858	596	5,840	4,670	8,554
Subtotal:-----		15,285	20,355	216,878	219,585	238,842	8,280	8,231	72,493	91,608	85,192
FR CAULFLWR(OCT)	MT										
CANADA		0	0	93	536	3,018	0	0	26	174	998
MEXICO		0	113	664	1,611	666	0	30	316	476	319
OTHER		119	0	139	0	192	74	0	89	0	133
Subtotal:-----		119	113	897	2,147	3,876	74	30	430	650	1,449
FR GARLIC(OCT)	MT										
MEXICO		2,015	2,347	3,015	3,607	10,500	1,834	1,874	3,155	2,898	11,055
CHINA, PEOPLES R		70	563	1,026	14,159	14,338	100	544	866	7,301	7,236
OTHER		457	128	3,413	3,455	4,333	727	182	4,287	4,287	4,854
Subtotal:-----		2,542	3,038	7,455	21,221	29,172	2,661	2,600	8,308	14,486	23,145
FR ONION(OCT)	MT										
MEXICO		31,709	31,786	150,303	142,884	192,287	14,719	15,715	68,520	83,537	93,837
OTHER		2,451	2,417	13,082	60,628	24,451	917	1,106	5,097	21,421	10,015
Subtotal:-----		34,160	34,203	163,385	203,512	216,739	15,636	16,821	73,617	104,958	103,853
FR PEPPERS(OCT)	MT										
MEXICO		12,504	14,807	117,975	121,200	138,708	16,640	13,183	106,671	116,403	134,106
EU		1,357	1,046	4,427	5,782	16,090	3,952	3,361	12,927	14,752	37,118
NETHERLANDS		1,331	1,013	4,290	5,593	15,624	3,862	3,249	12,487	14,153	35,960
OTHER		234	136	1,099	1,001	3,994	774	408	2,008	1,801	6,733
Subtotal:-----		14,095	15,989	123,500	127,985	158,793	21,366	16,952	121,606	132,956	177,957
FR SEED POT(OCT)	MT										
CANADA		28,015	35,876	67,545	102,507	74,524	4,698	7,173	10,553	21,007	11,499
OTHER		36	10	81	74	137	20	5	43	41	81
Subtotal:-----		28,051	35,886	67,625	102,581	74,661	4,718	7,178	10,596	21,049	11,579
FR TBL POT(OCT)	MT										
CANADA		35,546	22,165	172,903	168,156	227,512	6,293	5,402	27,543	39,455	38,014
OTHER		0	0	13	50	13	0	0	3	19	3
Subtotal:-----		35,546	22,165	172,916	168,206	227,525	6,293	5,402	27,546	39,474	38,017

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
APRIL 94

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY CURR MO LAST YR	QUANTITY CURR MO CURR YR	QUANTITY YR TDT LAST YR	QUANTITY YR TDT CURR YR	QUANTITY LAST YEAR	VALUE (1,000 DOLLARS) CURR MO LAST YR	VALUE CURR MO CURR YR	VALUE YR TDT LAST YR	VALUE YR TDT CURR YR	VALUE LAST YEAR
FR TOMATO(OCT)	MT										
MEXICO		60,780	45,492	284,448	300,348	365,168	37,601	23,377	224,601	247,165	289,182
OTHER		836	1,141	5,011	6,934	15,744	1,292	1,665	4,697	8,475	18,273
Subtotal:-----		61,616	46,633	289,459	307,282	380,912	38,893	25,041	229,298	255,640	307,454
FR ASPARG(OCT)	MT										
MEXICO		1,121	768	18,617	14,181	22,613	1,494	1,136	27,899	24,330	31,593
OTHER		4	24	5,152	6,439	7,239	19	66	5,508	8,085	7,620
Subtotal:-----		1,125	793	23,769	20,620	29,852	1,514	1,202	33,407	32,416	39,213
CANNED VEGETABLES											
CND TOM PST(JUL)	MT										
MEXICO		7,961	6,872	10,679	8,991	20,312	6,447	4,801	8,471	6,171	14,818
CHILE		419	1,510	5,988	3,211	7,176	254	1,266	3,310	2,627	4,122
OTHER		446	825	3,697	6,871	3,881	313	520	2,636	4,484	2,789
Subtotal:-----		8,826	9,208	20,365	19,073	31,369	7,014	6,588	14,417	13,282	21,730
CND TOM SAUCE(JUL)	MT										
CANADA		451	135	3,496	3,995	4,465	251	121	1,905	2,626	2,499
CHILE		390	324	2,144	904	2,239	182	125	1,280	460	1,325
DOMINICAN REPUBL		49	129	1,372	632	1,627	31	93	885	446	1,050
OTHER		199	1,686	1,470	4,236	1,552	124	1,163	1,032	4,233	1,115
Subtotal:-----		1,089	2,274	8,482	9,768	9,883	588	1,502	5,101	7,765	5,989
CND TOMATO(JUL)	MT										
CHILE		2,056	1,546	12,801	7,599	16,630	995	670	5,417	3,712	7,462
EU		1,413	1,285	14,826	13,437	16,765	423	487	5,454	4,314	6,087
ITALY		1,362	1,268	13,621	13,213	15,560	405	481	4,764	4,230	5,398
OTHER		288	729	10,915	12,271	11,901	134	296	3,970	4,534	4,363
Subtotal:-----		3,758	3,559	38,542	33,308	45,297	1,552	1,453	14,841	12,561	17,912
CND MSHROOM(JUL)	MT										
INDONESIA		1,363	1,098	13,904	8,218	15,958	3,059	2,835	34,651	18,793	39,390
CHINA, PEOPLES R		914	2,273	9,540	13,812	11,240	1,548	3,187	16,779	22,028	19,532
OTHER		1,507	3,642	17,451	21,356	21,018	3,067	7,854	38,430	47,419	45,934
Subtotal:-----		3,785	7,013	40,895	43,385	48,216	7,675	13,875	89,860	88,240	104,856
FROZEN VEGETABLES											
FZN BROCLI(SEP)	MT										
MEXICO		17,111	12,926	123,415	77,706	159,838	11,144	9,221	82,093	54,410	106,192
OTHER		433	286	11,762	13,235	15,408	312	139	8,536	8,574	10,933
Subtotal:-----		17,544	13,212	135,177	90,941	175,246	11,456	9,360	90,629	62,984	117,125
FZN CAULFLR(SEP)	MT										
MEXICO		333	319	18,969	24,729	20,199	236	227	13,496	21,691	14,433
OTHER		152	128	1,163	2,219	1,899	98	71	792	1,066	1,249
Subtotal:-----		485	448	20,132	26,947	22,097	334	298	14,289	22,757	15,682
FZN POTATO(SEP)	MT										
CANADA		12,252	11,668	76,663	85,290	121,553	6,767	6,351	42,813	47,546	66,834
OTHER		3	5	171	209	402	9	21	125	197	259
Subtotal:-----		12,255	11,674	76,834	85,499	121,956	6,776	6,373	42,938	47,743	67,093
TREE NUTS											
PISTACHIO NSH(SEP)	MT										
HONG KONG		0	0	0	15	40	0	0	0	35	81
TURKEY		0	0	7	107	7	0	0	24	296	24
OTHER		0	0	0	0	0	0	0	2	1	2
Subtotal:-----		0	0	7	122	47	0	0	26	332	107
CASHEW NUT(AUG)	MT										
INDIA		1,587	2,925	24,987	29,335	31,066	6,737	12,091	109,689	121,979	136,033
BRAZIL		1,257	1,351	20,807	15,440	27,735	4,887	6,506	81,912	67,462	109,075
OTHER		243	528	4,849	3,536	5,845	815	2,288	16,102	12,658	19,312
Subtotal:-----		3,086	4,804	50,644	48,312	64,645	12,439	20,885	207,702	202,099	264,421
FILBERTS(AUG)	MT										
TURKEY		242	220	3,192	2,731	3,944	559	850	8,327	8,856	10,245
OTHER		1	61	53	160	77	5	252	230	558	300
Subtotal:-----		242	281	3,245	2,890	4,022	564	1,102	8,556	9,413	10,544
PECANS NSH(SEP)	MT										
MEXICO		37	225	12,741	6,624	12,772	86	235	33,753	7,553	33,861
OTHER		0	0	148	327	148	0	0	449	1,081	449
Subtotal:-----		37	225	12,890	6,951	12,920	86	235	34,202	8,634	34,310
WINES											
CHMP&SPRK WN(JAN)	KL										
EU		1,739	1,339	5,447	5,027	30,523	17,319	13,755	51,825	47,149	265,363
FRANCE		646	594	1,988	1,973	10,065	13,377	10,741	38,024	34,390	179,059
ITALY		498	405	1,801	1,725	11,753	2,087	1,675	7,807	7,453	50,998
OTHER		10	6	63	113	302	33	77	234	369	1,034
Subtotal:-----		1,748	1,345	5,511	5,140	30,825	17,352	13,832	52,059	47,518	266,397
FT&VERM WN(JAN)	KL										
EU		937	1,025	2,995	3,657	12,389	3,645	3,907	11,056	13,918	48,713
ITALY		537	730	1,579	2,169	6,954	1,298	1,779	3,691	5,305	16,829
SPAIN		196	115	869	827	3,278	859	502	3,617	3,486	14,484
PORTUGAL		135	123	302	419	1,295	1,147	1,390	2,711	4,125	13,324
OTHER		7	11	49	55	159	43	52	212	215	671
Subtotal:-----		944	1,035	3,043	3,712	12,547	3,688	3,959	11,268	14,133	49,384
OTH GP WINE(JAN)	KL										
EU		13,397	14,379	40,525	50,110	152,864	52,856	47,243	156,213	161,769	553,012
FRANCE		4,523	4,681	14,851	16,017	55,169	31,959	22,649	94,579	81,298	303,623
ITALY		6,949	7,590	19,902	26,948	75,390	14,934	18,812	45,582	61,305	186,307
OTHER		3,417	3,859	12,964	13,378	42,637	8,148	9,444	28,430	31,311	97,598
Subtotal:-----		16,813	18,238	53,489	63,488	195,502	61,004	56,687	184,643	193,080	650,610
OTH WN PROD(JAN)	KL										
JAPAN		232	120	969	568	2,276	631	488	2,732	2,114	7,018
EU		342	230	1,074	1,397	3,709	499	344	1,543	1,872	5,144
CANADA		0	250	60	1,042	2,084	0	353	107	1,318	2,953
OTHER		36	83	248	346	1,148	82	169	523	687	2,121
Subtotal:-----		609	682	2,351	3,353	9,216	1,213	1,354	4,904	5,990	17,236
CUT FLOWERS											
ROSES(JAN)	NONE										
COLOMBIA		0	0	0	0	0	10,112	11,070	39,079	42,744	80,312
OTHER		0	0	0	0	0	2,716	3,402	12,422	15,852	27,079
Subtotal:-----		0	0	0	0	0	12,828	14,472	51,501	58,596	107,392
CARNATIONS(JAN)	NONE										
COLOMBIA		0	0	0	0	0	10,593	12,282	33,868	37,014	82,941
OTHER		0	0	0	0	0	429	454	930	1,314	2,143
Subtotal:-----		0	0	0	0	0	11,022	12,735	34,798	38,328	85,084

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